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ABSTRACT

In 1991, a study was conducted to provide a demographic profile of Colorado's community college faculty; to determine their retirement intentions; to predict the percent of faculty retiring over the next 14 years; to ascertain those incentives most favorable for retaining the services of faculty beyond their retirement eligibility; and to determine other aging/retirement concerns and perceptions. Surveys were delivered to 1,005 full-time teaching faculty and presidents at the state's 15 community colleges. Study findings, based on a 64.2% response rate, included the following: (1) over 57% of the full-time teaching faculty were over 44 years old, and nearly 20% were over 55; (2) 68.1% of the full-time teaching faculty had graduate degrees; (3) of the full-time teaching faculty 55 years of age and older, 92% planned to continue teaching until retirement eligibility; (4) the major concerns of the respondents about retiring and aging--regardless of age--were adequate financial resources and physical/health problems; (5) most of the respondents favored some form of incentive to continue working beyond retirement eligibility, particularly a raise for each year worked beyond retirement eligibility and part-time work after retirement at a prorated full-time salary; and (6) the respondents agreed that working beyond retirement was often related to income issues and that teaching opportunities at the college were limited for retired faculty. The survey instruments are attached. (JMC)

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COLORADO COMMUNITY COLLEGE SURVEY--FACULTY RETIREMENT AND RETENTION

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FINAL REPORT

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- Estes Park retired teachers/administrators, Estes Park, Colorado, who pilot tested the two survey instruments.

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COLORADO COMMUNITY COLLEGE SURVEY--FACULTY RETIREMENT AND RETENTION

EXECUTIVE SUMMARY

This study was commissioned by the Colorado Community College & Occupational Education System (CCCOES). The purpose was (1) to provide a demographic profile of the faculty; (2) to determine the retirement intentions of the faculty and predict the percent of faculty retiring over the next 14 years; (3) to ascertain those incentives most favorable for retaining the services of faculty beyond their retirement eligibility; and, (4) to determine other aging/retirement concerns and perceptions.

The target populations in the study included all full-time teaching faculty and the presidents employed in the 15 community colleges.

A question and answer format is used to communicate the general findings of the study.

** **What is the demographic profile of Colorado's Community College faculty by gender, age, ethnicity, and level of education?**

Of the respondents, 269 were female and 366 male. Over 57 percent of the full-time teaching faculty were 45 years of age and older. The percent of minority faculty represented in the study was 7.4 percent. Over 68 percent of the faculty had graduate degrees; 11.2 percent had associate degrees or less.

** **What is the retirement profile of full-time teaching faculty?**

Close to three-fifths (58.4 percent) of the faculty could retire in the next 14 years (1990 - 2004). Between 1990 and 1994 the highest percent for any institution is 30.3 percent (Front Range Community College), with 18.0 percent the average.

Individuals currently 55 years of age and older represent approximately 20 percent of the faculty. The percent of this cohort that can retire between 1990 and 2004 are:

1990 - 1994	58 percent,
1995 - 2000	30 percent, and
2001 - 2004	11 percent.

The five institutions with the highest percent of faculty who could retire over the next four years are:

Institutions	Percent
Front Range Community College	30.3%
Red Rocks Community College	29.2
Aims Community College	26.0
Northeastern Junior College	23.5
Pikes Peak Community College	21.3

** **What are the retirement intentions of the full-time teaching faculty?**

The early retirement intentions of the faculty are:
13 percent plan to take early retirement,
41 percent do not plan to take early retirement, and
46 percent are not sure.

The early retirement intentions of the faculty 55 years of age and older are:
19 percent plan to take early retirement,
46 percent plan not to take early retirement, and
35 percent are not sure.

The instructional areas with the highest percent of early retirements are:

Instructional Areas	Percent
Business: Agriculture	33.0%
Mathematics and Statistics	18.6
Special Need	16.7
Business: Management	16.0
Trade/Industry	15.6
Humanities	15.4

Working part-time after retirement in one's current career was not ranked as an important option by the faculty, especially females. Males ranked working part-time in current career field slightly higher than females.

** **What percent of the faculty plan to continue teaching until retirement eligibility, and what percent plan to stay at the college where employed until retirement?**

Approximately 76 percent of the faculty plan to continue teaching until retirement eligibility; 2.7 percent plan not to continue teaching until retirement; and, 21.3 percent are not sure. Of the faculty 55 years of age and older, 92 percent plan to continue teaching until retirement eligibility. Over 64 percent of the faculty plan to stay at their present

institution until retirement; 5.3 percent do not plan to stay; and, 30.6 percent are not sure.

** **What are the aging/retirement concerns of the faculty?**

Regardless of the age of the faculty, there were two major concerns about retiring and aging: adequate financial resources and physical/health problems.

** **What incentives will encourage faculty to delay retirement?**

Faculty agreed that the best incentive was to provide faculty with a substantial raise for each year worked beyond retirement eligibility. The second highest incentive was to work part-time after retirement at a prorated full-time salary. The third incentive was to receive a paid-up annuity for delaying retirement.

** **Do colleges have the financial resources to encourage outstanding educators to remain working beyond their retirement eligibility?**

The presidents indicated that encouraging faculty to extend their working years would require an attractive incentive package. They do not believe the colleges have the necessary resources to encourage faculty to delay retirement.

** **Are there different work alternatives/options that would encourage faculty to delay retirement?**

The faculty ranked part-time employment as the highest work option and rejected phased retirement.

** **What institutional services are needed to assist faculty make a smooth retirement transition?**

Twenty-one percent of the respondents 40 years of age and older had participated in PERA's retirement counseling service. Only 30.26 percent of the respondents 50 years of age and older, had participated in PERA's retirement counseling service.

Fifty-four percent of the respondents supported establishing a Career/Life Planning program in their institution, an indication that a long-term, continuous program is needed. Over 57 percent of the respondents under the age of 50 supported such a program. The presidents also agreed that a Career/Life Planning program should be developed.

** **What are the salient opinions of faculty 55 years of age and older regarding retirement issues?**

The older faculty agreed that working beyond retirement is often related to income issues. This group also perceives teaching opportunities in community colleges to be limited for retired faculty. When faculty, 55 years of age and older were asked what their college needed to be more competitive in recruiting and retaining a quality instructional faculty, the responses varied according to the level of education. The faculty with graduate degrees selected financial incentives to continue teaching; faculty with Bachelor degrees focused on higher salaries at the entry level; and faculty with Associate degrees perceived an improved professional working environment (e.g., faculty offices, adequate support staff, availability of modern instructional technology) as the best incentive in recruiting and retaining a quality instructional faculty.

When faculty 55 years of age and older were asked if they had experienced age discrimination only six males answered affirmatively. The six held graduate degrees.

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COLORADO COMMUNITY COLLEGE SURVEY--FACULTY RETIREMENT AND RETENTION

SECTION I

INTRODUCTION

This study was commissioned by the Colorado Community College & Occupational Education System. Information was gathered from two population groups in the 11 state supported and 4 local district community colleges: (1) Full-time teaching faculty in the 15 community colleges, and (2) Presidents of the 15 community colleges.

Although this report was prepared by the Institute for Collaborative Education, Research & Training, Inc. (ICERT, Inc.), the project was guided by a Project Steering Committee whose names appear in the acknowledgements.

Purpose

The purpose of this study was: (1) to provide a demographic profile of the faculty, (2) to determine the retirement intentions of the faculty and predict the percent of faculty retiring over the next 14 years, (3) to ascertain those incentives most favorable for retaining the services of faculty beyond their retirement eligibility, and (4) to determine other aging/retirement concerns and perceptions.

Need for the Study

A study on faculty retirement and retention was influenced by a number of trends: (1) the growth of community colleges over the past twenty years and the need for competent instructors, (2) the aging workforce in Colorado's community colleges, (3) policies that encourage early retirement, and (4) shortages of qualified faculty predicted by the turn-of-the century.

Review of the Literature

Introduction

A review of the literature was conducted (1) to better understand current issues and trends related to faculty retirement and retention, and (2) to construct survey instruments for the two populations involved in this survey.

Labor Force Demographics and Trends

Relatively few trends have been as consistent and significant as the aging of the population of the United States. The labor force is directly affected by this demographic change. "The United States is expected to face a severe labor shortage early in the next century" (Harris and Associates 1990).

The trends that are shaping the age structure of the labor force are the decreased labor-force participation of the over 65 population--partially due to early retirement policies and practices--and the baby boom heading for middle age, and the low birth rates of the 70's and early 80's (Robinson, 1982).

Other changes that are affecting population and labor force structure are decreasing mortality rates, the number of women, immigrants and refugees entering the workforce (U.S. Census Bureau, 1983). Women will take two-thirds of the new jobs in the 1990's. They will be the key workforce for the service and information society (Naisbitt, 1982). Nearly 60 percent of women age 45 to 64 are in the workforce, with a clear majority of them in jobs categorized as managerial, professional, and administrative (Deets, 1991). Though the number of women in the labor force over age 65 is still small, the percent has not changed for several decades. Over the past century, the number of men in the labor market over age 65 continues to decrease (Rosen and Jerdee, 1985). Thus, when we read about the trend toward early retirement, the focus is on men, not all workers (Clark, 1987).

"During the 1980's employers began to discover that they need the growing pool of capable older workers. The demographics are clear--there are, and will be, more older people capable of working past traditional retirement age. At the same time, fewer young people are entering the workforce. Many businesses have already begun to cultivate their older workers in preparation for the workplace of the future" (Thomas E. Helfrich, Senior Vice President, Travelers Insurance Companies, 1990).

The notion that older people will be in demand in the work force because of a shortage of younger workers, needs to be reexamined in the light of projected high immigration and refugees flows into the United States (Kieffer, 1983). Larson (1991) reports this past academic year two-thirds of all America's PhDs were foreign born. About one-half of all teaching assistantships available in masters and doctoral degree granting institutions are held by foreign students (Ellis and Mulvey, 1989). Of 7,327 physics and astronomy graduate students survey nationally in 1989, 2,502 were identified as minority students, but only 282 were U.S. citizens or about 4 percent (Ellis et al., 1989).

Faculty Supply and Demand Factors

There is a conspicuous absence of faculty supply and demand research discussed in the literature as related to community colleges. The studies that exist are focused primarily on public supported baccalaureate institutions.

The first comprehensive study that predicts a shortfall in the supply of high quality faculty was conducted in 1986 by Bowen and Schuster which focused on 38 research universities. In this study the predicted faculty shortage was due to (1) an increase in faculty retirements, (2) a decline in recruitment of top students into the academy, and (3) an anticipated student enrollment increase in the mid-1990s. In recent studies (Bowen and Soca 1989; Gamson, Finnegan, Youn, 1990) the conclusions differ from the previous study. These studies indicate faculty shortage is neither retirement nor age-related, but, rather due to several other factors including a decrease in production of new doctorates, a projected increase in enrollments and decreases in student-faculty ratios.

There are two primary factors which create a demand for faculty: (1) the need to replace faculty due to retirement, career change, or death; and (2) the need to add new faculty to accommodate expanding enrollments, changes in student/faculty ratios, or academic program development (WICHE, 1990).

The Western Interstate Commission for Higher Education (WICHE, 1988) reported on high school graduates, projected by state, 1986 to 2004 which shows increases in the number of high school graduates after 1994 and suggests that if the relative number of these graduates who enroll in postsecondary education is equal to recent historical levels, there will be a significant increase in the number of students in higher education.

McGuire and Price (1990) examined the demand factor in 45 colleges and universities. The results indicated that (1) the faculty retirement rate will increase significantly during the next 20 years (by 37 percent), with the largest number of retirements occurring during the second decade; total faculty separations (for reasons of retirement and non-retirement) will increase 42 percent during this period; (3) there will be differential increases in faculty demand and differences in timing of that demand among disciplines); (4) total annual hires, including replacements and new faculty, are projected to increase by approximately 39 percent (ranging from 7.1 percent to 8.3 percent annually) between 1990 and 2010; and, (5) a significant proportion of faculty hires may be the result of inter-institutional mobility and promotion from part-time to full-time status, with less reliance on new doctoral recipients as a source of faculty.

A study of 101 baccalaureate institutions by Lozier and Dooris regarding faculty retirement patterns, will be released in July 1991, by WICHE entitled Faculty Retirement Projections Beyond 1994: Effects of Policy on Individual Choice. The highlights of this study are:

- The two most salient factors affecting faculty retirement are the faculty member's overall financial status and eligibility for full retirement benefits.

- Across disciplines, the largest number of retirements are projected to occur from 1998 through 2002-03.

- Retirement projections vary by discipline. Languages and letters are currently experiencing peak retirements. Social sciences and psychology expect to remain stable. Mathematical and physical science retirements are projected to increase moderately but steadily to 2002-03. The life science retirements are projected to increase through the mid-1990s and return to current levels by 2002-2003. The **greatest number of retirement replacements will be in the humanities and social sciences.**

The American Council on Education reported in Campus Trends, 1990 that many higher education institutions are already experiencing greater difficulty in hiring faculty, in terms of both getting top applicants to accept positions and taking longer to find qualified persons to fill faculty positions (El-Khawas, 1990).

Half of the nation's teachers according to the National Education Association, will be eligible for retirement by the year 2000 (Rocky Mountain News, 1990). The Colorado Department of Education reported (June 1991), a teacher shortage in the elementary/secondary schools is not anticipated until a large cohort group retires in about 15 to 20 years. The average age of elementary/secondary schools teachers in Colorado is 41. There are several exceptions. There is a shortage of minority teachers, bilingual teachers, special education teachers, and teachers who are willing to work in rural/isolated areas of the state.

An estimated 14.4 million students (8.5 million full-time; 5.9 million part-time) were enrolled at postsecondary institutions in the United States in the fall of 1989. This represents an increase of about three percent over fall 1988 enrollments: 2 percent at four-year and 4 percent at two-year institutions. Virtually all growth occurred at public institutions. This increase occurred despite a continued decline in the number of 18- to 24-year-olds in the population. About 58 percent of all students were enrolled in four-year institutions, 38 percent in two-year institutions, and the remaining 4 percent in less-than-two-year institutions (Kroe, 1990).

In summary, a faculty shortage is predicted beginning in the mid-90s in baccalaureate institutions due to an increase in faculty retirement and an increase in college enrollments. Another factor that may or may not affect community colleges is the decline in the number of doctoral recipients interested in a faculty career (WICHE, 1990).

Retirement

"The term retirement is ambiguous. It is not clear whether retirement is most appropriately conceived as an event, a process, a social role, or a phase of life" (Parnes, 1981). Retirement has become an important public policy issue in recent years and is likely to attract even more attention over the next several decades. The reasons are fairly clear, more workers choose early retirement plans offered by their employers. They retire early mainly because they can.

In a survey conducted for the Wall Street Journal by Paulson and Kainen, 1990, two-thirds of the retired respondents said they enjoyed their leisure, but they had reservations about retirement:

- More than half said they were not as comfortable financially as they were before retiring.
- Nearly one-fifth said their standard of living was "a lot lower.
- Only one-quarter said they received income from stocks, bonds, or other investments.
- About one retiree in seven works, mostly part-time.

The decision to adopt the age 65 as retirement criterion was made at a time when life expectancy was 41.7 years for males, 43.5 for females. If a similar logic were applied today, then retirement from gainful employment would not occur below the age of 95 to 100 (Mowsesian, 1986).

A study by the Consortium on Financing Higher Education (1987) provides data on more than 5,500 faculty retirees from baccalaureate institutions. The average retirement age increased from 64.6 in 1982 to 66.0 years in 1985, with 28 percent retiring when they reached the mandatory retirement age of 70. Inasmuch as salaries are usually higher in baccalaureate institutions and studies indicate salary levels affect retention, this may account for the increase in retirement age at these institutions.

The State Higher Education Executive Officers (Dorsey and Lavery, 1989) surveyed 23 states and the District of Columbia to determine the number of faculty who were 55 years of age or older. Information on 114,000 faculty showed that 21 percent (23,835) of

faculty were 55 or older, suggesting that there will be a sizable number of retirements within the next 10 years.

To retire or not to retire is a question with quite different answers to those who like their jobs and to those who do not. According to Koshland (1988), mandatory retirement has largely disappeared in universities/colleges. He believes the challenge is to develop some scheme of retirement based on performance not age, and one that does not block the advancement of young people. The profession needs to think of the criteria that justify continued employment. Early retirement for some and late retirement for others may well average out to a more productive profession.

A survey of 188 respondents out of 593 retirees from institutions with policies of mandatory retirement at age 70 found all faculty were influenced by the incentives for early retirement (Kellams and Chronister, 1988).

Malcolm H. Morrison, director of the National Studies on Mandatory Retirement, U.S. Department of Labor perceives older workers competing against the largest cohort of middle-age workers in our country's history; in the absence of other options, the elderly may feel increased pressure to retire or work part-time (1983).

Increased longevity and shifts in the worker-to-retiree ratio will in all likelihood lead to changes in Social Security, including a rise in the age of eligibility, the taxing of benefits, a reduction in protection from inflation, and the elimination of some benefits (Dychtwald and Flower, 1989). Many older adults will find it increasingly difficult to maintain a reasonable standard of living without work of some kind. Perhaps we will soon realize that retirement isn't really retiring at all. According to Webster's Ninth New Collegiate Dictionary, to "retire" means "to withdraw, especially for privacy; to fall back, recede." Perhaps a better use of terms are "first retirement," "second retirement" (just as we now are comfortable with the concept of "first and second marriage").

Dychtwald and Flower (1990) predict that people may never retire. "...Many people will stop working one or more times in their 40s or 70s to go back to school, raise a second or third family, start a new business, or simply take a sabbatical for a couple of years. The traditional ordering of education, work, and leisure will come unglued." Dyshtwald also perceives sabbatical leaves, common to the academic sector, will be used by business with a job guaranteed upon return.

In summary, tomorrow's work force will be older, more diverse in terms of gender and race, marked by intense competition for jobs and promotion, less unionized, and better educated (Best, 1985). The realignment of values and aspirations resulting from these

changes is likely to exert considerable influence on the nature of work and retirement in the decades ahead.

Phased Retirement--Transitional Programs

Evidence is mounting on the positive effects of flexible retirement options. Sheppard (1978) noted that for most workers approaching retirement age, the only available options are full-time work or no work at all.

Many companies have created transition or alternative retirement programs. For example, Poloroid Corporation workers may make a variety of other arrangements for as long as 5 years before retirement including a "rehearsal retirement" plan which allows the worker to experience retirement without making the irreversible decision about terminating employment. Of those who have taken the time off, about half decide to return to work full-time.

Phased retirement in education was prompted by the passage of the 1978 Amendments to the Age Discrimination in Employment Act and the elimination of the mandatory retirement age for almost all workers. Paul (1983) cited a case where a state university became concerned that young, non-tenured professors would increasingly be unable to receive promotions if more faculty were to remain working. The university developed a phased retirement program. All employees 60 or older who had accumulated 20 or more years of service were eligible for the phased retirement. Employees who were approved for the program assumed a work schedule that was reduced gradually over a specified period of phased retirement or received a reduced appointment that remains the same for the entire period. Salary is based upon a percentage of the regular full-time pay. Any amount of the employee's pension income may be drawn during the phase-out period with the only limitation being that the pension income and combined salary not be more than the full-time wage rate for the position in any year. Staff using the option continue to be eligible for all fringe benefits as part-time workers; the school continues its regular contributions to the medical, disability and life insurance benefits that are based on the part-time, rather than the full-time salary. Most option proposals are approved for a two-year period, being specified in a written contract.

The Colorado State Board for Community Colleges and Occupational Education modified its early retirement program on October 11, 1990 to include a pre-retirement option that would allow employees who are approved for early retirement to choose one of three transitional programs whereby faculty may work after retirement for their base salary with a salary increase. The Colorado Public Employees' Retirement Association (PERA), however, will not count the additional salary earned for computing retirement benefits. This PERA decision eliminates the incentive

to retire under the pre-retirement option. There is also some risk involved with retaining the plan in the light of Older Worker's Benefits Protection Act (McEldowney, 1991).

According to Doering (1983), "It is expected that pre-retirement programs will increasingly be instituted by organizations to ease the transition to retirement. These programs, including pre-retirement counseling, will be needed at earlier ages to prepare workers for the social, economic, and emotional impacts of retirement."

Strategies and Incentives for Employee Retention

The Western Interstate Commission for Higher Education (WICHE) in a discussion paper, Factors Affecting Faculty Supply and Demand (1990) noted three strategies for the recruitment and retention of faculty:

a. Enhancing the faculty profession as a career choice through the development of policies to ensure competitive compensation for faculty and appropriate reward systems.

b. Improving the management of faculty by increasing the flexibility of personnel policies across the board from the initial hiring, through workload assignment, to eventual retirement.

c. Creating and supporting professional development programs for faculty at early-, mid-, and late-career including faculty exchanges, alternate work assignments, administrative assignment, and retraining programs.

Matier's 1990 study on retaining faculty found two factors the most salient in a faculty member's decision either to remain or leave were **tangible** benefits, such as salary, income potential, benefits, better equipped facilities, and better support structures; and **intangible** benefits associated with their work environment, such as research opportunities, reputation of associates, congeniality of associates, reputation of department, and rapport with departmental leadership. The author points out that these specific results are not generalizable to other four-year education settings, nevertheless, the results may provide insight into the "push-pull" factors which influence mobility and retirement decisions.

A study at the University of Richmond found tangible incentives to be merit pay, grants, and support, including clerical, technical, equipment, library. Intangible incentives included tenure, promotion (status rather than money), release time, sabbatical leaves, and a series of mechanisms for increasing collegiality and professional development (Bowen, 1985).

The trend toward early retirement suggests that given an adequate income in retirement and the lack of strong incentives to remain in employment, most older workers prefer to withdraw from the labor force. "Present information suggests that policies which simply provide the opportunity for older workers to continue on the job will fail to result in significant changes in retirement patterns. Successful attempts to change or reverse the trend toward early retirement will require a sound base of knowledge concerning the incentives and disincentives to retirement, as well as the development of new human resource policies by the employers which encourage the utilization of older workers" (Cooperman and Keast, (1983).

Facilitating faculty vitality was discussed by Bevan (1985). The key factors included: decisive leadership and support, an informal environment that promotes personal interaction, a common understanding of mission and corresponding professional expectations, attention to new faculty, attention to senior faculty, rewards that are correlated with talent (i.e., excellence in teaching, research), merit pay, funds for faculty development, faculty autonomy over academic structure and programs (that does not violate the integrity of the program or impede students' progress), and flexible planning. Key factors that inhibit vitality included: insulated departments, departmental structures that promote competitiveness and positions of "turf" control rather than cooperative interaction, limited options for continuing faculty development, poor communication, lack of correlation between faculty development and student development goals, and the threat of open assessment.

Wylie and Fuller (1985) gave the Great Lakes College Association as an example of how consortia of small colleges can enhance faculty vitality through collaboration with colleagues at other institutions. In a university study of 71 normal and early retirees, the researcher concluded that faculty retired because they had lost their enthusiasm, vitality for teaching (Wilson, 1989).

The business incentives that appear to be most appealing for delaying retirement are (1) financial, and (2) new ways to work or alternatives/options. Ragan (1980) concluded in her monograph Work and Retirement Policy Issues: "There is a growing need for more work options across the life span due to dramatic changes in the population structure, the economy, legislation, and individual attitudes toward work." Several work options are briefly described below.

Work Options

Redesigning work tasks to accommodate older workers by improving the intrinsic interest of the job is probably the most relevant for those in professional positions (McConnell, 1980). An example of a redesigned job is mentorship in which an older worker is a facilitator for the career development of younger employees. Levin (1990) perceives this work option proliferating. Mentally young but chronologically older individuals, according to Koshland (1988), could lighten the teaching load of faculty starting an academic career.

Redesigning organizations can create a more organic, low-structured organization. This structure is most effective when individuals within the organization are well skilled/educated, and when individuals have high self-esteem and strong needs of achievement, and autonomy (Doering, et.al., 1983). Redesigning organizations require redesigning jobs/positions. Rather than encouraging individuals to become more proficient in a narrow field of work, jobs and career paths might be envisioned such that they foster the development of multiple skills and knowledge, and at the same time make ownership in the organization more challenging and interesting over a long span of time.

Periodic sabbatical leaves is one means of altering the linear life plan which will be important if people work longer. The concept of universal sabbaticals for all workers--not just college/university professors--is barely in the discussion stage in the literature. The French have a system whereby employers are taxed by the Government to provide paid leaves of absence for education and training. Ragan (1980) proposed a second plan which would be a voluntary fund into which employees and employers would contribute and to which the government would pay interest. The fund would be indexed to keep abreast of inflation. At various intervals the workers would be allowed to draw on this fund to take a sabbatical leave. Gosta Rehr, a French consultant, has suggested a "lifelong drawing fund" which would integrate pensions with periodic sabbatical leaves (Best, 1978).

In Colorado, a "sabbatical leave" is considered by PERA as a period of absence. If there is reduced salary, the employee earns partial service credit. However, the employee has the option of making additional contributions on what would have been their regular salary in order to maintain the service credit.

Job sharing is one variation on part-time work that holds particular promise for older workers. It has been tried by public educational institutions faced with having to layoff teachers and desiring to maintain a young workforce. These institutions target the "over 55" instructors by offering a continuation of full fringe benefits with a 50 percent reduction in pay if the teachers elected

to work half-time by sharing their jobs with other staff; pension credits continued to accrue at the full-time wage rate (Paul, 1983).

Retraining, Career Planning, and Development. Alan Piefer, president emeritus of the Carnegie Corporation was quoted as saying: "Companies are quite willing to invest in the retraining of a younger worker, and yet in all probability that younger worker won't stay with them as long as the older one. So the investment is sort of wasted. Employers should look seriously at the question of retraining employees age 50 and over. They should do so with the thought that these people might be with them another 10 to 15 years and they would get back more than their investment" (Carlson, 1985). Career pathing of professional faculty to assume new tasks or a second career may help both the worker and the institution (Rosen, et.al, 1985).

Retraining has been found by Paul (1983) to be helpful in remotivating older staff who appear to be "coasting" until retirement. Most of the retraining in business takes place in-house and is taught by company employees, at convenient times for the employees. Retraining is costly but considered important as a means of updating the skills of older workers and as a means of promoting the extension of employees' worklife so as to have businesses meet the labor shortage problems it anticipates experiencing in the near future.

Career planning consists of developing a plan for a career and a strategy for achieving that plan. Career planning for an aging work force may help to circumvent technological obsolescence and the advent of the midcareer crises. It may also facilitate both the maintenance of high performance levels throughout one's career and the career-change process (Doering, et. al., 1983).

Retiree Job Bank has proven to be less expensive for many businesses (Helfrich, 1990). The retiree job bank provides a labor pool that is quickly available to work on temporary, part-time work assignments. At Travelers Insurance Companies the employees are usually not offered fringe benefits, but they continue receiving full pension benefits during their employment. The major cost of the business has been the provision of liability insurance for the rehired worker (Zetlin, 1989).

Part-time work is the most common practice for accommodating the older worker. The work can be permanent or temporary. There are a number of obstacles to part-time work, the income is often not sufficient to be a real incentive unless other benefits are included (McConnell, 1980).

A study regarding work alternatives--other than full-time employment--for older Americans (Paul, 1983) found three variables that appeared to influence the extent to which work options are used. These variables include the degree to which management communicates the availability of the options to older employees, the type of compensation and employee benefits provided with the options, and work restrictions imposed by federal employment policies. Jacobson (1980) summarized the new work options as "part-time work, phased retirement, second-career training, and re-entry work options."

Retirement Policies

Mowsesian (1986) suggested that organizations take a broader more comprehensive approach to their human resource policies. He perceived interrelated policy domains. The first was a policy related to the fullest development of the productive capacities of human beings. The second category for a human resource policy had to do with the allocation of resources. With the changes in technology, for example, Mowsesian believed it was essential that more and expanded education/training be developed for employees. "Future workers will need to think in terms of multiple careers during their work lives rather than the one career which has been the norm. Life-long education and retraining will become a necessity rather than an exception." Human resource utilization is a third category for a human resource policy. The concept of employee development and utilization has not been a priority of most educational institutions (Doering, et. al., 1983)

In a Gallup survey of workers over age 63, more listed benefits than salary as a major reason for working. The researcher stated "I think it is very dangerous to underestimate the power of continued benefits for older workers" when developing retirement/pre-retirement policies (Zetlin (1989).

Retirement Preparation

Helping each older employee to realize his or her full potential for productive and remunerative work activity in keeping with personal desires is a role of administrators according to Rosen (1985). This includes planning and phasing employees into a retirement. Training and development needs must be systematically assessed at all career stages.

Retirement preparation is greater among older age groups, presumably aging increases retirement planning. Evans, Ekerfdt, and Bosse (1985) found that proximity to retirement was a significant predictor of the amount of preparation regardless of the attitudes held about retiring. Some research suggests that anticipatory interest may be underway as early as 15 years prior to retirement,

but comprehensive retirement preparation is not very common in the United States, even among professionals (Kilty and Behling, 1986; Block, 1984).

Retirement preparation consists of activity that some suggest is least pursued by those who need it most (Beck, 1984; Fillenbaum, 1971). Fillenbaum, George, and Palmore (1985) suggest the perceived adequacy of one's income motivates those of upper economic levels to take action to preserve their current standard of living as much as possible during retirement. An increased level of preparatory activity among those of higher socioeconomic status may be the result of greater availability of planning resources. Olson (1981) reported that there has been a rapid increase in the development of corporate retirement preparation programs. Attendance at formal retirement preparation programs is usually low, older workers of higher socioeconomic levels are those most likely to attend (Champione, 1988).

Ferraro (1990) examined cohort differences and changes in preparation for retirement. Analysis of the covariates showed that education is very strongly related to retirement preparation: better educated respondents prepared more. Minorities prepared less than whites respondents. There was no significant differences in preparation by sex.

Rosen and Jerdee, (1985) found that of the three human resource management programs designed for older workers: job redesign, flexible retirement options, and pre-retirement counseling, the most effective was pre-retirement counseling.

Good retirement planning program, according to The DYG, Inc. research includes financial planning, housing, working options, quality use of time, and health care. The program also includes the spouse or significant other. DYG (1990) also found that in addition to group seminars as a method of reaching employees, a correspondence-type program has also proven effective.

Dychtwald (1990) head of Age Wave, Inc. believes the evolution of pre-retirement planning must focus on three equally important components: financial planning, mental and physical wellness planning, and lifestyle planning. He also suggested this type of program be offered to workers of all ages.

Human Resource Management and Related Issues

According to Redwood (1990), the basic human resource management challenge in the coming decade will be how to mold a labor force comprised of more female, minority, and older workers into a more skilled, productive, and adaptable resource. He also stressed adopting a philosophy that recognizes the employee as a

valuable asset whose capabilities have to be nurtured and developed over the period of employment.

Rosen, et al.(1985) suggested that managers and administrators who would like to review their own roles and responsibilities in human resource planning and career management process might ask themselves the following questions (which have been slightly changed to apply to educational institutions):

1. What organizational changes are likely to affect the way my institution or division will operate in the next few years?

2. What changes will take place in the staffing needs over the next ten years?

3. Which present employees are likely to need further training or development to remain employable, productive, flexible (willing to change) and innovative.

4. What are the options for reassigning individuals or redesigning jobs to create a better match between individual skills and abilities, and future division requirements?

5. In planning for the future are there any major constraints that must be considered within the organization and staff?

6. What are the career aspirations and personal development activities of the staff? Do they have a strategic plan?

7. What are the retirement intentions of each employee? Do many employees plan to postpone their retirement?

8. How important is it to organizational effectiveness, to my own administrative effectiveness, and to the security, motivation, and career advancement of each of my employees for me to answer these questions knowledgeably? Do I need to give human resource management and career planning a higher priority? Is human resource management a recognized assignment of division directors?

WICHE (1990) in a discussion paper on faculty supply and demand focused on three issues that must be addressed by decision makers in education to avoid a faculty shortage crisis:

1. Compensation and recruitment
2. Maintaining a faculty that is both stable and flexible
3. Professional development

Questions to be Answered

The questions to be answered by this study are:

1. What is the demographic profile of Colorado's community college faculty by gender, age, ethnicity, and level of education?
2. What is the retirement profile of full-time teaching faculty?
3. What are the retirement intentions of the full-time teaching faculty?
4. What percent of the faculty plan to continue teaching until retirement eligibility, and what percent plan to stay at the college where employed until retirement?
5. What are the aging/retirement concerns of the faculty?
6. What incentives will encourage faculty to delay retirement?
7. Do colleges have the financial resources to encourage outstanding educators to remain working beyond their retirement eligibility?
8. Are there different work alternatives/options that would encourage faculty to delay retirement?
9. What institutional services are needed to assist faculty make a smooth retirement transition?
10. What are the salient opinions of faculty 55 years of age and older regarding retirement issues?

Definition of Terms

1. Community College--The 11 state supported and 4 local district community colleges in the State of Colorado.
2. Full-time Teaching Faculty--One who teaches more than 50 percent of an instructional load.
3. Retention--The continuation of gainful employment beyond retirement eligibility.
4. Retirement--The act of leaving, withdrawing from gainful employment.
5. Retirement eligibility--When an employee meets the age and service requirements under PERA regulations for retirement.

6. Time of Retirement--the last day the employee works prior to retirement under the PERA regulations.

Organization of the Study

Two surveys were used to gather information for determining faculty profiles, retirement intentions of community college faculty, retention incentives, and other aging/retirement concerns. The survey populations were Colorado's 15 community college presidents and full-time teaching faculty.

The methodology and findings are presented separately for each survey instrument. This is followed by a discussion of findings and recommendations.

SECTION II

THE FACULTY SURVEY

Methodology

Sample Selection

The target population was full-time teaching faculty in Colorado's 11 state supported and 4 local district community colleges in Colorado during the Fall semester of 1990. The faculty population for this study was determine by the community college presidents. The definition of a full-time teaching faculty was one who taught more than 50 percent of an instructional load.

The goal of the sampling strategy was to encourage all full-time teaching faculty (1005) to complete the survey in order to establish a faculty profile that would aid human resource planning at the 15 community colleges. The number of full-time teaching faculty receiving surveys at each institution, and the response rate are contained in Table 1.

Instrument Development

A draft instrument was developed based on the purpose of the study and information from the literature review. The draft was revised after a review by the Project Steering Committee. This revised draft was then reviewed by six deans. After revisions the instrument was pilot tested with retired teachers/administrators residing in Estes Park, Colorado. The pilot respondents found the time required reasonable and questions comprehensible. At this point, the survey instrument was deemed final. A copy of the instrument is included in Appendix A.

Data Collection, Entry, and Editing

Beginning September 6, 1990, the survey instruments were delivered to the offices of community college presidents. Thirty minutes were spent with the executive and her/his secretary to discuss distribution and collection. Faculty name labels with institutional mail box numbers had been attached to the surveys to facilitate distribution. Cover letters were written by the presidents encouraging faculty to support the study and reminding them of the deadline date of October 26 for returning the survey to their office or to ICERT, Inc. Faculty were asked to remove their name label before returning the survey. Eighty-two percent of faculty returned the surveys directly to the office of the president.

Completed surveys were given to Colorado Community College & Occupational Education System for data entry, computer editing, and data analysis. Most responses were reported as aggregate data, not by institutions.

Response Rate

A total of 1,005 surveys were delivered to the community colleges. The faculty returns were 645. The response rate was 64.2 percent. Approximately 31 surveys were received after the deadline for return. Institutional responses appear in Table 1. Responses by instructional areas are contained in Table 2

Table 1

FACULTY RESPONSE BY INSTITUTION

Institutions	Faculty Surveys Distributed	Surveys Returned	Percent
State Supported Colleges			
Arapahoe Community College	94	68	72.3%
Community College of Aurora	13	12	92.3
Community College of Denver	112	36	32.1
Front Range Community College	122	51	42.0
Lamar Community College	24	17	71.0
Morgan Community College	34	20	58.8
Otero Junior College	28	25	89.3
Pikes Peak Community College	116	79	68.1
Pueblo Community College	89	55	62.0
Red Rocks Community College	60	38	63.3
Trinidad State Junior College	44	44	100.0
Totals:	736	445	60.5%
Local District Colleges			
Aims Community College	113	70	61.9%
Colorado Mountain College	64	40	62.5
Colorado Northwestern C.C.	30	30	100.0
Northeastern Jr. College	62	52	84.0
Totals:	269	192	71.4%
T.H. Pickens, Area Voc. School		1	
Unknown		7	
TOTALS:	1005	645	64.2%

Table 2

SURVEY RESPONSE BY INSTRUCTIONAL AREAS

Instructional Areas	Number of Responses (n = 645)	Percent
Business - Agriculture	19	2.9%
Business - Management	26	4.0
Business - Office	84	13.0
Business - Marketing & Distribution	11	1.7
Health	72	11.2
Home Economics	14	2.2
Technical - Protective Services	21	3.3
Technical - Computer/Information Sciences	15	2.3
Technical - Engineering/Science Tech.	40	6.2
Technical - Communication Technologies	9	1.4
Trade and Industry	66	10.2
Special Needs	12	1.9
Mathematics and Statistics	44	6.8
Sciences	34	5.3
Letters	56	8.7
Humanities	13	2.0
Communication	3	.5
Social Sciences	40	6.2
Art and Design	15	2.3
Education	6	.9
Other	38	5.9
Unknown	7	1.1
Total:	645	100.0%

Findings

The foci of this faculty survey were faculty profiles, retirement, retention incentives, and perceptions. The sub-headings used to report the findings were:

- o Demographic Profile of Faculty
- o Retirement Profiles
- o Concerns about Retirement and Aging
- o Retention Incentives and Work Options
- o Pre-retirement Services
- o Faculty Opinions Regarding Retirement
- o Opinions of Faculty 55 Years of Age and Older

Demographic Profile of Faculty

Descriptive statistics pertaining to gender and area of instruction are contained in Table 3.

Highlights of findings were:

* The population sampled closely agreed with figures from the Colorado Commission on Higher Education. According to their reports, there were 1194 full-time teaching faculty in Colorado's 15 community colleges, Fall 1990. The survey sample provided by the community colleges totaled 1005.

* In the Fall of 1990, the percent of minority faculty in Colorado's 15 community colleges was 11.7 percent. Of the 645 faculty who responded to the survey, 7.4 were minority.

* In the Fall of 1990 the student enrollment totalled 74,137, according to CCHE. Of that total 16.1 percent were minorities.

* Over 57 percent of the full-time teaching faculty in the community colleges are 45 years of age and older. Nearly 20 percent are 55 years of age and older.

* The largest percent of the full-time teaching faculty (68.1 percent) have graduate degrees.

Table 3

DEMOGRAPHIC PROFILE OF FACULTY

	Number of Responses (n = 645)	Percent
Gender		
Female	269	41.7%
Male	366	56.7
Unknown	10	1.6
Age		
39 or less	140	21.7%
40-44	128	19.8
45-49	125	19.4
50-54	117	18.1
55 and over	128	19.8
Unknown	7	1.1
Ethnicity		
Minorities	48	7.4%
White/Caucasian	582	90.2
Unknown	15	2.3
Level of Education		
Associate Degree or less	72	11.2%
Bachelor	126	19.5
Graduate Degree	439	68.1
Unknown	8	1.2

Retirement Profiles

Descriptive statistics pertaining to retirement plans by gender, age, level of education, and ethnicity can be found in Table 4. A profile of faculty by institution who plan to continue teaching and take early retirement can be found in Table 5. A profile of faculty by instructional areas who plan to continue teaching and take early retirement can be found in Table 6. A profile of faculty who plan to stay at their present institution of employment and the number of years until they retire can be found in Table 7. Retirement activities planned after retirement and reported by gender, age, and level of education can be found in Table 8.

Highlights of the findings were:

* Of the full-time teaching faculty, **55 years of age and older**, 92 percent plan to continue teaching until retirement eligibility; 94 percent plan to stay at the institution where they are currently employed; and, 19 percent plan to take early retirement.

* The percent of full-time teaching faculty that are currently **55 years of age and older** that can retire between 1990 and 2004 are:

  1990 - 1994 (58 percent)
  1995 - 2000 (30 percent)
  2001 - 2004 (11 percent)

* The five institutions with the highest percent of full-time teaching faculty who can retire over the next four years are:

  FRCC (30.3 percent)
  RRCC (29.2 percent)
  AIMS (26.0 percent)
  NJC (23.5 percent)
  PPCC (21.3 percent)

* Between 1990 and 2004 (14 years), 58.4 percent of the faculty respondents (n = 637) could retire.

* Approximately 13 percent of the full-time teaching faculty plan to take early retirement; 41 percent have decided not to take early retirement, with 46 percent not sure about the early retirement option.

* Only 2.7 percent of the full-time teaching faculty plan **not** to continue teaching until retirement eligibility. All the respondents at four institutions (PCC, RRCC, TSJC, and CNCC) plan to continue teaching until retirement eligibility.

* The six instructional areas with a high percent of anticipated early retirements are:

Business: Agriculture	(33 percent)
Mathematics and Statistics	(18.6 percent)
Special Needs	(16.7 percent)
Business: Management	(16.0 percent)
Trade/Industry	(15.6 percent)
Humanities	(15.4 percent)

* The highest rated retirement activity of all respondents regardless of age was travel. Pursuing hobbies was the second choice of females and the third choice of males. Part-time work was a third choice for females and the second choice of males.

Table 4

RETIREMENT PLANS BY GENDER, AGE, LEVEL OF EDUCATION, AND ETHNICITY

Variable	Gender		Age			Level of Education			Ethnicity	
	%Female	%Male	%<40	%40-54	%>54	%A*	%B*	%G*	%Minority	%White
Plan to teach:	n=265	n=364	n=139	n=366	n=129	n=72	n=125	n=436	n=47	n=579
YES	70	80	52	80	92	72	70	78	72	76
NO	4	2	5	2	1	4	4	2	2	3
NOT SURE	26	18	43	18	7	24	26	20	26	21
Stay at college:	n=267	n=364	n=139	n=368	n=127	n=72	n=125	n=438	n=47	n=581
YES	58	68	32	66	94	63	54	67	60	64
NO	7	4	13	4	1	4	7	5	2	6
NOT SURE	35	28	55	30	5	33	39	28	38	30
Retire early:	n=268	n=361	n=139	n=368	n=125	n=71	n=125	n=437	n=47	n=579
YES	10	16	7	13	19	15	14	12	9	13
NO	43	39	43	38	46	41	42	41	36	42
NOT SURE	47	45	50	49	35	44	44	47	55	45
2										
Year to retire:	n=167	n=254	n= 88	n=241	n= 93	n=46	n= 83	n=293	n=25	n=394
<5 years	15	19	0	9	58	11	13	21	12	19
5-9 years	15	21	1	20	30	22	16	20	24	18
10-14 years	20	24	6	32	11	17	18	23	8	22
15-19 years	19	11	15	19	0	11	16	14	16	14
20-24 years	15	11	22	14	1	15	16	11	16	13
24> years	16	14	57	5	0	24	22	11	24	15

* A: Associate Degree or less; B: Bachelor Degree; G: Graduate Degree

Table 5

Institutional Profile of Faculty--Number and Percent Who Plan to Continue Teaching Until Retirement and Those Who Plan to Take Early Retirement

Institution	Plan to Teach Until Retirement				Plan to Take Early Retirement			
	N	Yes %	No %	Not Sure %	N	Yes %	No %	Not Sure %
ACC	68	69.1	2.9	27.9	68	11.8	41.2	47.1
CCA	12	41.7	8.3	50.0	12	16.7	58.3	25.0
CCD	34	58.8	5.9	35.3	36	8.3	38.9	52.8
FRCC	50	86.0	2.0	12.0	50	10.0	34.0	56.0
LCC	17	70.6	11.8	17.6	17	11.8	47.1	41.2
MCC	19	68.4	10.5	21.1	19	15.8	31.6	52.6
OJC	24	83.3	4.2	12.5	24	12.5	37.5	50.0
PPCC	79	87.3	1.3	11.4	79	21.5	38.0	40.5
PCC	54	72.2	0	27.8	54	5.6	51.9	42.6
RRCC	38	84.2	0	15.8	37	16.2	35.1	48.6
TSJC	44	77.3	0	22.7	44	18.2	34.1	47.7
AIMS	69	75.4	1.4	23.2	69	15.9	43.5	40.6
CMC	39	74.4	5.1	20.5	38	0	39.5	60.5
CNCC	30	86.7	0	13.3	30	0	53.3	46.7
NJC	52	76.9	3.8	19.2	52	19.2	38.5	42.3
THP-AVS	1	0	0	100.0	1	0	100.0	0
UNKNOWN	5	40.0	0	60.0	5	20.0	60.0	20.0
Totals:	635	76.1	2.7	21.3	635	12.9	40.9	46.1

Table 6

FACULTY WHO PLAN TO CONTINUE TEACHING UNTIL RETIREMENT
AND THOSE WHO PLAN TO TAKE EARLY RETIREMENT BY PROGRAM AREAS

Program Areas	Plan to Teach Until Retirement				Plan to Take Early Retirement			
	n	Yes %	No %	Not Sure %	n	Yes %	No %	Not Sure %
Bus. - Agri.	19	68.4	0	31.6	18	33.3	33.3	33.3
Bus. - Mgt.	25	84.0	4.0	12.0	25	16.0	56.0	28.0
Bus. - Office	83	72.3	4.8	22.9	84	16.7	36.9	46.4
Mkt. - Dist.	11	72.7	9.1	18.2	11	9.1	54.5	36.4
Health	72	61.1	5.6	33.3	72	11.1	36.1	52.8
Home Econ.	14	85.7	0	14.3	14	14.3	64.3	21.4
Protective Ser.	21	76.2	4.8	19.0	21	14.3	57.1	28.6
Computer Inf.	15	66.7	0	33.3	15	6.7	60.0	33.3
Eng. Sci.-Tec.	40	97.5	0	2.5	40	15.0	50.0	35.0
Comm. Tech.	9	77.8	0	22.2	9	11.1	33.3	55.6
Trade/Indust.	66	78.8	1.5	19.7	64	15.6	35.9	48.4
Special Needs	12	91.7	8.3	0	12	16.7	25.0	58.3
Math & Stat.	44	79.5	0	20.5	43	18.6	34.9	46.5
Science	34	82.4	0	17.6	34	8.8	29.4	61.8
Letters	55	74.5	1.8	23.6	55	7.3	43.6	49.1
Humanities	13	76.9	0	23.1	13	15.4	53.8	30.8
Comm.	3	66.7	0	33.3	3	0	33.3	66.7
Soc. Science	39	74.4	7.7	17.9	40	5.0	50.0	45.0
Art & Design	15	66.7	0	33.3	15	13.3	26.7	60.0
Education	6	100.0	0	0	6	0	33.3	66.7
Other	38	73.7	0	26.3	38	7.9	34.2	57.9
Totals:	634	76.0	2.7	21.3	632	13.0	40.8	46.2

Table 7

NUMBER OF FACULTY BY INSTITUTION WHO PLAN TO STAY AT THE COLLEGE UNTIL RETIREMENT AND THE NUMBER OF YEARS UNTIL THEY CAN RETIRE

Institution	Plan to Stay at College Until Retirement				Number of Years Until Retirement						
	n	Yes %	No %	Not Sure %	n	<5YRS %	5-9YRS %	10-14YRS %	15-19YRS %	20-24YRS %	>24YRS %
ACC	68	61.8	8.8	29.4	42	14.3	4.8	31.0	26.2	9.5	14.3
CCA	12	16.7	25.0	58.3	6	16.7	0	16.7	33.3	0	33.3
CCD	35	57.1	5.7	37.1	15	20.0	13.3	40.0	13.3	0	13.3
FRCC	50	78.0	2.0	20.0	33	30.3	21.2	24.2	12.1	3.0	9.1
LCC	17	64.7	11.8	23.5	11	18.2	18.2	18.2	27.3	9.1	9.1
MCC	19	47.4	15.8	36.8	10	10.0	20.0	30.0	10.0	10.0	20.0
OJC	25	76.0	4.0	20.0	16	12.5	31.3	25.0	0	18.8	12.5
PPCC	79	75.9	0	24.1	61	21.3	27.9	23.0	11.5	11.5	4.9
PCC	54	55.6	5.6	38.9	39	10.3	12.8	15.4	10.3	28.2	23.1
RRCC	38	76.3	0	23.7	24	29.2	20.8	33.3	8.3	4.2	4.2
TSJC	44	68.2	4.5	27.3	34	14.7	17.6	11.8	11.8	20.6	23.5
AIMS	69	66.7	2.9	30.4	50	26.0	16.0	16.0	14.0	10.0	18.0
CMC	39	59.0	5.1	35.9	20	5.0	10.0	25.0	20.0	20.0	20.0
CNCC	30	56.7	6.7	36.7	25	0	12.0	24.0	20.0	24.0	20.0
NJC	52	55.8	9.6	34.6	34	23.5	29.4	11.8	8.8	8.8	17.6
THP-AVS	1	0	0	100.0	0	0	0	0	0	0	0
UNKNOWN	5	40.0	0	60.0	3	0	66.7	33.3	0	0	0
Totals:	637	64.1	5.3	30.6	423	18.0	18.4	22.0	13.9	12.8	14.9

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Table 8

FACULTY--40 YEARS OF AGE AND OLDER--RESPONSE TO RETIREMENT PLANS
[Mean score based on the ranking of the top three plans]

Plans	Gender		Age		Level of Education		
	n = 415		n = 420		n = 417		
	Female	Male	<50	>49	Associate/Lower	Bachelor	Graduate
Travel	1.52	1.53	1.53	1.53	1.37	1.62	1.53
Pursue hobbies	1.08	1.06	1.14	0.98	1.09	1.32	1.00
Relax/no special plans	0.32	0.22	0.24	0.24	0.14	0.35	0.24
Learn about topics of interest	0.65	0.47	0.64	0.45	0.71	0.82	0.47
Work part-time in current career field	0.92	1.08	0.93	1.12	0.77	0.85	1.10
Develop new skills	0.48	0.42	0.42	0.45	0.43	0.27	0.47
Pursue a new career	0.38	0.56	0.45	0.54	0.29	0.21	0.58
Complete a degree/pursue more education	0.18	0.13	0.14	0.12	0.23	0.27	0.09
Other plans	0.35	0.16	0.21	0.25	0.26	0.18	0.24

Concerns About Retirement and Aging

Descriptive statistics pertaining to concerns about retiring and aging by faculty are contained in Table 9.

Highlights of the findings were:

* The major concerns of the respondents about retiring and aging--regardless of age--were adequate financial resources (85.42 percent of the females, and 89.57 percent of the males); and, physical/health problems (54.86 percent of the females, and 59.24 of the males).

* The least concerns of respondents about retiring and aging were: too many demands on time by family or community; loss of independence; too much free time; change of life style; and, loss of contacts with peers and friends.

Table 9

FACULTY--40 YEARS OF AGE AND OLDER--CONCERNS ABOUT RETIRING AND AGING, BY GENDER AND AGE

Concerns H = High Concerns L = Lower Concerns		Gender (n = 355)					Age (n = 359)				
			Female (n = 144)		Male (n = 211)			<50 (n = 189)		>49 (n = 170)	
		Total	n	%	n	%	Total	n	%	n	%
Adequate financial resources	H	312	123	85.42	189	89.57	315	167	89.36	148	87.06
	L	43	21	14.58	22	10.43	44	22	11.64	22	12.94
Physical/ health problems	H	204	79	54.86	125	59.24	206	123	65.08	83	48.82
	L	151	65	45.14	86	40.76	153	66	34.92	87	51.18
Loss of identify and importance	H	28	16	11.11	12	5.69	28	15	7.94	13	7.65
	L	327	128	88.89	199	94.31	331	174	92.06	157	92.35
Loss of contacts with peers and friends	H	34	15	10.42	19	9.01	34	15	7.94	19	11.18
	L	321	129	89.58	192	90.99	325	174	92.06	151	88.82
Too much free time	H	14	9	6.25	5	2.37	14	7	3.70	7	4.12
	L	341	135	93.75	206	97.63	345	182	96.30	163	95.88
Change in life style	H	16	6	4.17	10	4.74	16	4	2.12	12	7.06
	L	339	138	95.83	201	95.26	343	185	97.88	158	92.94
Too many demands on my time by family/community	H	7	4	2.78	3	1.42	7	1	.53	6	3.53
	L	348	140	97.22	208	98.58	352	188	99.47	164	96.47
Loss of independence	H	9	1	.70	8	3.79	10	9	4.76	1	.59
	L	346	143	99.30	203	96.21	349	180	95.24	169	99.41
Other concerns	H	11	4	2.78	7	3.32	11	4	2.12	7	4.12
	L	344	140	97.22	204	96.68	348	185	97.88	163	95.88
Summary: Some concerns		355	144	77.42	211	74.56	359	189	77.78	170	73.59
No concerns		114	42	22.58	72	25.44	115	54	22.22	61	26.41

* Top two concerns = High Concern; The third concern = Lower Concern.

Retention Incentives and Work Options

Descriptive statistics pertaining to incentives that would encourage faculty to work fater retirement eligibility are contained in Table 10. Descriptive statistics pertaining to faculty opinions regarding alternative work options after retirement appear in Table 11.

Highlights of findings were:

* Most of the respondents favored some form of incentive to continue working beyond retirement eligibility. There was no clear mandate as to what incentive would encourage faculty to continue their professional career beyond retirement eligibility.

* The three highest ranked incentives the respondents would seriously consider were: receive a substantial raise for each year worked beyond retirement eligibility; receive a paid-up annuity for delaying retirement; and, work part-time after retirement at a prorated full-time salary.

* The least favored incentive was a phased retirement program where work days/hours are reduced, thus extending the number of working years.

* The ranking of incentives were reflected in the respondents' ranking of work options. The highest mean score for a preferred work option was part-time employment at a prorated full-time salary; the lowest ranked worked option was phased retirement.

* None of the work options were perceived as non-workable or appalling to the respondents.

Table 10

INCENTIVES THAT WOULD ENCOURAGE FACULTY--40 YEARS OF AGE AND OLDER--TO WORK AFTER RETIREMENT ELIGIBILITY

Incentives		Gender (n = 456)					Age (n = 460)			
H = High Incentive* L = Lower Incentive*			Female (n = 178)		Male (n = 278)		<50 (n = 234)		>49 (n = 226)	
		Total	n	%	n	%	n	%	n	%
A substantial raise for each year worked beyond retirement eligibility.	H	204	75	42.13	129	46.40	97	41.45	109	48.23
	L	252	103	57.87	149	53.60	137	58.55	117	51.77
Work part-time after retirement at a prorated full-time salary.	H	188	66	37.08	122	43.88	82	35.04	107	47.35
	L	268	112	62.92	156	56.12	152	64.96	119	52.65
A paid-up annuity for delaying retirement.	H	132	55	30.90	77	27.70	74	31.62	60	26.55
	L	324	123	69.10	201	72.30	160	68.38	166	73.45
Compress the instructional workweek into three days.	H	90	43	24.16	47	16.91	48	20.51	42	18.58
	L	366	135	75.84	231	83.09	186	79.49	184	81.42
Re-design present job to include other functions and reduce teaching load.	H	79	30	16.85	49	17.63	45	19.23	34	15.04
	L	377	148	83.15	229	82.37	189	80.77	192	84.96
Re-design present job to include only classroom instruction.	H	76	29	16.29	47	16.91	46	19.66	30	13.27
	L	380	149	83.71	231	83.09	188	80.34	196	86.73
Phased retirement, at age 55, the work days/hours would be reduced, thus extending the number of working years.	H	71	36	20.22	35	12.59	39	16.67	32	14.16
	L	385	142	79.78	243	87.41	195	83.33	194	85.84

* Faculty were asked to rank those incentives they would seriously considered. Top two incentives = (H) or High Incentive; the other ranked incentives = (L) the Lower Incentive.

Table 11

FACULTY--40 YEARS OF AGE AND OLDER--OPINIONS AS TO RETIREMENT WORK OPTIONS
A Likert scale was used to determine mean scores:
[5 = Excellent Idea; 4 = Some Potential; 3 = No Opinion; 2 = Not Workable; and 1 = Appalling Idea]

	Gender			Age			Level of Education			
Work Options	n	Female %	Male %	n	<50 %	>49 %	n	Assoc./Lower %	Bachelor %	Graduate %
Part-time employment.	479	4.56	4.42	484	4.47	4.48	482	4.26	4.45	4.50
Mentoring	472	4.19	3.95	477	4.13	3.95	475	4.03	3.98	4.06
Compressed instructional workweek	467	3.95	3.85	472	4.00	3.77	470	3.76	3.88	3.91
Job Sharing	467	3.86	3.27	472	3.57	3.44	470	3.03	3.43	3.58
Enterprise contracting	467	3.38	3.56	472	3.48	3.51	470	3.78	3.28	3.52
Performance (project) contracting	460	3.58	3.33	465	3.45	3.38	463	3.72	3.26	3.42
Phased retirement	448	3.31	3.09	453	3.28	3.07	452	3.06	3.14	3.20

Pre-retirement Services

Demographic statistics pertaining to faculty participation in retirement counseling services of PERA and those who plan to participate in the future are contained in Table 12. Opinions of faculty regarding their willingness to participate in a Career/Life Planning Program sponsored by their institution is contained in Table 13.

Highlights of the findings were:

* Approximately 21 percent of the respondents 40 years of age and older have participated in PERA's retirement counseling program.

* Almost 70 percent of the respondents 50 years of age and older have not participated in PERA's retirement counseling program.

* Those respondents 40 years of age and older who plan to participate in future PERA retirement programs totaled 237, or 59 percent.

* A finding not reported in table form was the higher the level of education, the more likely the respondent is to participate in retirement counseling services.

* Over fifty-five percent of the respondents 40 years of age and older were supportive of establishing a Career/Life Planning Program in their institution. Less than 10 percent of the respondents under the age of 50 did not support such a program.

Table 12

PAST AND FUTURE PARTICIPATION OF FACULTY 40 YEARS OF AGE AND OLDER IN PERA'S RETIREMENT COUNSELING SERVICE

Past Participation	Gender (n = 404)				Age (n = 407)			
	Female		Male		<50		>49	
	n	%	n	%	n	%	n	%
Yes	28	19.05	55	21.40	16	8.94	69	30.26
No	119	80.95	202	78.60	163	91.06	159	69.74
Totals:	147	100.00%	257	100.00%	179	100.00%	228	100.00%

Future Participation	Gender (n = 398)				Age (n = 401)			
	Female		Male		<50		>49	
	n	%	n	%	n	%	n	%
Yes	80	54.80	155	61.51	90	50.28	147	66.22
No	7	4.79	24	9.52	14	7.82	17	7.66
Not Sure	59	40.41	73	28.97	75	41.90	58	26.12
Totals:	146	100.00%	252	100.00%	179	100.00%	222	100.00%

Table 13

FACULTY--40 YEARS OF AGE AND OLDER--OPINION ON ESTABLISHING A CAREER/LIFE PLANNING PROGRAM IN THEIR INSTITUTION

Response	Gender (n = 489)				Age (n = 494)			
	Female		Male		<50		>49	
	n	%	n	%	n	%	n	%
Yes	114	59.07	154	52.03	144	57.37	125	51.44
No	9	4.66	37	12.50	23	9.16	23	9.47
Not Sure	70	36.27	105	35.47	84	33.47	95	39.09
Totals	193	100.00%	296	100.00%	251	100.00%	243	100.00%

Faculty Options

Descriptive statistics pertaining to faculty opinions on retirement issues are contained in Table 14.

Highlights of the findings were:

* The two opinion statements on which the respondents highly agreed were: assisting faculty in remaining current in the face of rapid technological change is a growing challenge for community colleges; and, encouraging faculty to extend their working years will require an attractive incentive package.

* The respondents mainly disagreed that if there is a faculty shortage the least affected would be the rural institutions; and they disagreed with the statement that present retirement policies are satisfactory, changes are not needed.

* Age and level of education were not significant factors when responding to the opinion statements.

Table 14

FACULTY OPINIONS
MEAN SCORES DETERMINED BY A LIKERT SCALE
[1 = Strongly Disagree; 2 = Disagree; 3 = Undecided; 4= Agree; 5 = Strongly Agree]

Opinion Statement	Gender			Age			Level of Education			
	n	Female	Male	n	<50	>49	n	Assoc./Lower	Bachelor	Graduate
Encouraging faculty to work beyond retirement is a worthwhile goal of the college.	487	3.86	3.97	492	3.87	3.99	490	4.12	3.74	3.95
The present retirement policies are satisfactory; changes are not needed.	480	2.79	2.79	485	2.67	2.91	483	3.10	2.89	2.73
Emeritus faculty designation should be based on past performance.	484	3.89	3.99	489	3.91	3.99	487	4.17	3.82	3.95
Teaching overloads have become the most used method for increasing PERA retirement benefits.	484	3.38	3.54	489	3.38	3.58	487	3.29	3.37	3.53
The needs of older faculty should be a powerful cause for institutional concern and action planning.	484	3.96	3.91	489	3.85	4.01	487	3.90	3.85	3.95
Assisting faculty in remaining current in the face of rapid technological change is a growing challenge for community colleges.	488	4.50	4.44	493	4.48	4.45	491	4.53	4.50	4.45
Encouraging faculty to extend their working years will require an attractive incentive package.	487	4.27	4.25	492	4.27	4.24	490	4.19	4.26	4.26

Table 14 (continued)

FACULTY OPINIONS
MEAN SCORES DETERMINED BY A LIKERT SCALE
[1 = Strongly Disagree; 2 = Disagree; 3 = Undecided; 4 = Agree; 5 = Strongly Agree]

Opinion Statements	Gender			Age			Level of Education			
	n	Female	Male	n	<50	>49	n	Assoc./Lower	Bachelor	Graduate
Colleges have the financial resources to encourage outstanding educators to remain beyond their retirement eligibility.	487	3.17	3.33	492	3.22	3.32	490	3.26	3.09	3.30
Career/Life Planning Programs should be designed for different age groups.	485	3.96	3.79	490	3.86	3.83	488	3.95	3.89	3.82
If there is a faculty shortage in the foreseeable future, the institutions least affected will be those located in rural Colorado.	486	2.29	2.37	491	2.25	2.43	489	2.58	2.24	2.33

Opinions of Faculty 55 Years of Age and Older

Descriptive statistics pertaining to the opinions of faculty 55 years of age and older are contained in three tables. Table 15 contains faculty opinions related to retirement; Table 16 are the responses to ways colleges can be more competitive in recruiting and retaining a quality instruction faculty; and Table 17 the response of faculty to the question of discrimination in their current institution of employment.

Highlights of the findings were:

* The respondents agree that working beyond retirement is often related to income issues; and, teaching opportunities at the college are limited for retired faculty.

* There was little agreement with the statement that faculty who are near retirement have other wage earning pursuits in addition to their work at the college.

* When faculty, 55 years of age and older, were asked what their college needed to be more competitive in recruiting and retaining a quality instructional faculty, the item receiving the highest rating from individuals holding a graduate degree was: financial incentives to continue teaching. The item receiving the highest rating from individuals with a Bachelor's degree was: higher salaries at the entry level. The item receiving the highest rating from individuals with an Associate Degree or less was: an improved professional working environment (e.g., faculty offices, adequate support staff, availability of modern instructional technology).

* The respondents did not perceive the following would make colleges more competitive in recruiting and retaining a quality instructional staff: (1) higher degree standards for academic fields with higher salaries for faculty, and (2) reduce student contact hours in the general education/academic areas.

* There were 121 faculty who responded to the question, "Have you experienced age discrimination at current institution?" Six males answered "yes" to the question, no females. The six male respondents held graduate degrees. There were 115 who answered "no."

Table 15

OPINIONS OF FACULTY 55 YEARS OF AGE AND OLDER REGARDING RETIREMENT
MEAN SCORES DETERMINED BY A LIKERT SCALE
[1 = Strong Disagree, 2 = Disagree, 3= Undecided, 4 = Agree, 5 = Strongly Agree]

Opinion Statements	Gender			Level of Education			
	n	Female	Male	n	Assoc./Lower	Bachelor	Graduate
Working beyond "normal" retirement is often related to income issues.	124	4.11	4.33	126	4.00	4.00	4.36
Not working beyond "normal" retirement is often related to health issues.	124	3.40	3.80	126	3.81	3.62	3.66
Economic pressure to delay retirement are mounting	123	3.80	4.16	125	4.00	4.00	4.09
Most senior faculty are experiencing job burn-out.	125	3.11	3.26	127	3.38	3.29	3.16
Most faculty who are near retirement have other wage earning pursuits in addition to their work at the college.	124	2.60	2.88	126	3.19	3.10	2.66
Other than teaching, job opportunities at the college are limited for retired faculty.	124	4.00	3.84	126	3.94	3.52	3.97

Table 16

OPINIONS OF FACULTY, 55 YEARS OF AGE AND OLDER, AS TO WHAT IS NEEDED TO MAKE COLLEGES MORE COMPETITIVE IN RECRUITING AND RETAINING A QUALITY INSTRUCTIONAL STAFF

[Coding for Mean Scores: 0 = No Importance; 1 = Less Important; 4 = Most Important]

Opinion Statements	Gender		Level of Education		
	Female (n = 126)	Male	Assoc./Lower	Bachelor (n = 128)	Graduate
Higher salaries at the entry level.	1.64	2.00	1.50	2.43	1.82
Financial incentives to continue teaching.	2.28	2.11	1.50	1.48	2.42
More work options before and after retirement.	0.75	0.76	0.63	0.62	0.82
Higher degree standards for faculty in academic fields along with higher salaries.	0.25	0.56	0.44	0.29	0.52
Higher salaries to attract more business and industry employees to teaching.	0.56	1.26	1.06	1.38	0.96
Reduced student contact hours, in the vocational/ occupational/technical areas.	0.81	0.69	0.94	1.05	0.64
Reduced student contact hours, in the general education/academic areas.	0.44	0.56	0.06	0.52	0.59
Greater latitude for experimentation (e.g. designing jobs which encompass multiple skills and functions, thus better utilizing of personnel).	0.72	0.57	0.69	0.71	0.60
Improved performance standards and assessment procedures that weed-out the poor instructors and reward individuals for excellence in teaching and related activities.	1.19	0.98	1.13	1.19	0.97
An improved professional working environment (e.g., faculty offices, adequate support staff, availability of modern instructional technology.	1.17	1.27	1.69	1.29	1.16
Professional development plans that promote faculty career planning and pathing.	0.50	0.56	0.19	0.57	0.59

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Table 17
AGE DISCRIMINATION EXPERIENCED BY FACULTY 55 YEARS OF AGE AND OLDER

	Gender				Level of Education					
	Female		Male		Assoc./Lower		Bachelor		Graduate	
Response	n	%	n	%	n	%	n	%	n	%
Yes	0	0	6	6.90	0	0	0	0	6	6.82
No	34	100.00	81	93.10	16	100.00	19	100.00	82	93.18

SECTION III

THE INSTITUTIONAL SURVEY

Methodology

Sample Selection

The sample consisted of all 11 state supported community colleges and the 4 local district colleges in Colorado. The institutional surveys were delivered to the college presidents. The number and percent of institutions responding to the survey are presented in Table 18.

Instrument Development

A draft survey instrument was developed based on the literature review, comments from the Project Steering Committee, and interviews with Colorado Community College & Occupational Education System staff. The draft was critiqued by six college deans. After revisions, the instrument was piloted tested for clarity by retired educators living in the Estes Park, Colorado region. The pilot respondents made several recommendations that were incorporated into the final instrument. A copy of the instrument is included in Appendix A.

Data Collection, Entry, and Editing

Beginning September 6, 1990, the surveys were delivered to each college president with an explanation to the importance of institutional input to this study. The deadline date was October 26 for the return of surveys. Returned surveys were given to the Colorado Community College & Occupational Education System for data entry and computer editing prior to analysis. Most responses were reported as aggregate data, not by institutions.

Response Rate

The response rate to the institutional survey is contained in Table 18. Fifteen institutions were provided with surveys. Ten surveys were returned, with a response rate of 67 percent.

Table 18

RESPONSE RATE TO INSTITUTIONAL SURVEY

Type of Institution	Number of Colleges	Number of Responses	Percent
State Community College System	11	7	63.6%
Local District Colleges	4	3	75.0
Totals	15	10	67.0%

Findings

The foci of this survey were perceptions regarding faculty retirement, faculty shortage, and incentives to retain the services of faculty. The following sub-headings were used to summarize the findings:

- Faculty Shortages
- Competitors and Competitiveness
- Incentives
- Work options
- Institutional perceptions
- What-if scenario

Faculty Shortages

Highlights of findings were:

* The 10 institutions responding were divided evenly on whether community colleges would have a faculty shortage near the end of this decade.

* Those five respondents who anticipated a faculty shortage perceived all instructional areas being affected except Home Economics.

* The three major reasons given by those respondents **not** perceiving a faculty shortage were:

  --The lack of State Certification requirements in the General Education/Academic areas which allow colleges to hire qualified teachers from business, industry, government, and other private entities.

--The current length of faculty contracts is attractive to potential full-time faculty.
--The college's salary schedule attracts public school teachers to seek employment.

Competitors and Competitiveness

Highlights of the findings were:

* Six of the community colleges ranked four-year public colleges/universities as their major competitor for hiring qualified faculty; and, the second major competitor was the local public schools. The least competitive institutions were private two-year schools/colleges.

* When the respondents were asked what would help colleges be more competitive in recruiting and retaining a quality instructional staff, the top three responses, in order of rank of importance, were:

  --Higher salaries at the entry level.
  --Higher degree standards for faculty in the academic fields along with higher salaries.
  --Reduced student contact hours in the general education/academic areas.

Incentives

Highlights of the findings were:

* Nine of the 10 respondents disagreed with the statement that no incentive will encourage our faculty to continue working full-time or part-time past retirement eligibility.

* The major incentives for encouraging faculty to continue working beyond their retirement eligibility--in order of rank--were:

  --Receive a substantial raise for each year worked beyond retirement eligibility.

  --Plan a phased retirement program.

  --Redesign their present jobs to include other functions and reduce teaching loads.

  --Be assured that part-time employment is available upon retirement and compensation is a prorated full-time salary.

Work Options

Highlights of the findings were:

* The work options considered to be the most realistic for encouraging older faculty to remain working beyond the usual retirement age--in order of rank--were:

  --Job Sharing. Two or more faculty members share the same job. this would mean sharing salary and instructional responsibilities.

  --Compressed Instructional Workweek. Options available to full-time and part-time faculty. An example of a compressed instructional workweek might be M-T-W or Th-F-Sat.

  --Mentoring. Faculty provides counsel to less experienced instructors.

  --Part-time Employment. Compensation is based on a prorated full-time salary.

* Those work options considered least workable in a community college were:

  --Phased Retirement. At age 55--after at least five years of service--individuals are eligible for reducing the number of days worked per year. This would require the faculty member to work longer to complete retirement eligibility.

  --Performance (Project) Contracting. Employment is based on a legal document that specifies tasks and time-lines; signed by institution and retired employee.

Institutional Perceptions

Community college presidents were asked to select an appropriate response to 16 statements regarding faculty retirement. A Likert scale was used to force a degree of agreement response. The agreement response scale was assigned numeric values on a 5-point scale (1.0 = strongly disagree to 5.0 = strongly agree), which permitted an arithmetic mean for each statement to be computed. Mean scores ranged from 2.50 to 4.70. Table 19 contains the ordinal ranking of statements.

Highlights of the findings were:

* The respondents highly agreed that keeping faculty technologically current is a challenge for community colleges; and, emeritus faculty designation should be based on past performance.

* The respondents disagreed with the statement that community colleges located in rural Colorado would be the least affected if there was a faculty shortage; and, the respondents disagreed that their colleges had the financial resources to encourage outstanding educators to remain working beyond their retirement eligibility.

Table 19

INSTITUTIONAL PERCEPTIONS
ORDINAL RANKING OF RESPONSES, UTILIZING A LIKERT SCALE
[1.0 = Strongly Disagree to 5.0 = Strongly Agree]

Rank	Statement	Mean
1	Assisting faculty in remaining current in the face of rapid technological change is a growing challenge for community colleges.	4.70
2	Emeritus faculty designation should be based on past performance as an instructor.	4.40
3	Encouraging faculty to extend their working years will require an attractive incentive package.	4.20
4	Economic pressure to delay retirement is mounting.	4.10
5	Career/Life Planning Programs should be designed for different faculty age groups.	4.00
6	Not working beyond "normal" retirement is often related to **health** issues.	4.00
7	Working beyond "normal" retirement is often related to **income** issues.	3.90
8	Other than teaching, job opportunities at the college are limited for retired faculty.	3.90
9	Encouraging faculty to work beyond retirement eligibility is a worthwhile goal of the college.	3.70
10	The present retirement policies of CCCOES or my District College are satisfactory; changes are not needed.	3.60
11	Teaching overloads have become the most used method for increasing PERA retirement benefits.	3.50

Table 19 (continued)

INSTITUTIONAL PERCEPTIONS
ORDINAL RANKING OF RESPONSES, UTILIZING A LIKERT SCALE
[1.0 = Strongly Disagree to 5.0 Strongly Agree]

Rank	Statement	Mean
12	The needs of older faculty should be a powerful cause for institutional concern and action planning.	3.30
13	Most senior faculty are experiencing job "burn-out".	3.30
14	Most faculty who are near retirement have other wage-earning pursuits in addition to their work at the college.	3.10
15	If there is a faculty shortage in the foreseeable future, the institutions **least** affected will be those located in rural Colorado.	2.60
16	College has the financial resources to encourage outstanding educators to remain working beyond their retirement eligibility.	2.50

What-if Scenario

The presidents were asked to assume that fifty percent of their entire faculty could retire in the next five years, thus, what would be the best options for hiring/retaining qualified faculty. The three highest responses--in order of rank--were:

* Increase salaries for new, younger faculty recruits.

* Encourage faculty to work full-time beyond retirement eligibility years to increase their PERA retirement income benefits.

* Provide incentives other than salary to encourage older faculty members to remain working full-time or part-time, and younger qualified faculty members to join the professional staff.

SECTION IV

SUMMARY, DISCUSSION, AND RECOMMENDATIONS

Purpose of the Study

This study focused on the full-time teaching faculty in the 15 community colleges in Colorado. The purpose of the study was: (1) to provide a demographic profile of the faculty, (2) to determine the retirement intentions of the faculty and predict the percent of faculty retiring over the next 14 years, (3) to ascertain those incentives most favorable for retaining the services of faculty beyond their retirement eligibility, (4) to determine other aging/retirement concerns and perceptions.

Target Populations

There were 1,005 surveys distributed to faculty with 645 surveys returned or a response rate of 64.2 percent. Fifteen institutional surveys were delivered to the presidents with a return of 10 or a response rate of 67 percent.

Summary of Selected Findings

Demographic Profile of Faculty

Over 57 percent of the full-time teaching faculty are 45 years of age and older. The percent of full-time teaching faculty by levels of education are:

Graduate degrees	68.1 percent,
Bachelor degrees	19.5 percent, and
Associate degree or less	11.2 percent.

The percent of minority faculty represented in the study was 7.4 percent.

Retirement

Over 58 percent of the respondents could retire in the next 14 years (1990 - 2004). Between 1990 and 1994 the highest percent for any institution is 30.3 percent (FRCC), with 18.0 percent the average. In the first five years of this decade, the Colorado community colleges will lose between 76 and 115 full-time teaching faculty if they stay until retirement eligibility.

The faculty currently 55 years of age and older represent approximately 20 percent of the faculty. The percent of this cohort that can retire between 1990 and 2004 are:

1990 - 1994 58 percent,
1995 - 2000 30 percent, and
2001 - 2004 11 percent.

The five institutions with the highest percent of faculty who could retire over the next four years are:

FRCC 30.3 percent,
RRCC 29.2 percent,
AIMS 26.0 percent,
NJC 23.5 percent, and
PPCC 21.3 percent.

Early Retirement

The early retirement considerations of all faculty are:
13 percent of the faculty plan to take early retirement,
41 percent do not plan to take early retirement, and
46 percent are not sure.

The early retirement considerations by faculty 55 years of age and older are:

19 percent of the faculty over 55 plan to take early retirement,
46 percent plan not to take early retirement, and
35 percent are not sure about early retirement.

There are six instructional areas with a high percent of anticipated early retirements:

Business: Agriculture	33.0 percent,
Mathematics and Statistics	18.6 percent,
Special Needs	16.7 percent,
Business: Management	16.0 percent,
Trade/Industry	15.6 percent, and
Humanities	15.4 percent.

Activity Plans After Retirement

The activity plans after retirement by females and males--in order of rank--are:
Females: travel, pursue hobbies, work part-time, and
Males: travel, work part-time, pursue hobbies.

Continue Teaching

Approximately 76 percent of the faculty plan to continue teaching until retirement eligibility; 2.7 percent plan not to continue teaching until retirement; and, 21.3 percent are not sure.

Of the faculty 55 years of age and older, 92 percent plan to continue teaching until retirement eligibility.

Stay at Institution Where Employed

Over 64 percent of the faculty plan to stay at their present institution until retirement; 5.3 percent do not plan to stay at the college were employed; and, 30.6 percent of the faculty are not sure if they will stay at the college where employed.

Major Aging/Retirement Concerns

Regardless of age, there were two major concerns about retiring and aging: adequate financial resources and physical/health problems.

Retention Incentives

The faculty and presidents agreed that the best incentive was to provide faculty with a substantial raise for each year worked beyond retirement eligibility. The faculty and presidents widely disagreed on the other incentives. For example, the second and third incentives of faculty were: work part-time after retirement at a prorated full-time salary; and, receive a paid-up annuity for delaying retirement. The presidents' second and third incentives were: phased retirement, and redesign jobs to include other functions and reduce teaching loads.

Work Options

The work options ranked the highest and the least favored by faculty was a reflection of their choice of incentives. The highest ranked work option was part-time employment and the lowest ranked option was phased retirement. The highest ranked work options by the Presidents were: job sharing, compressed instructional workweek, mentoring, and part-time employment.

Pre-Retirement Services

Twenty-one percent of the faculty 40 years of age and older have participated in PERA's retirement counseling services. Only 30.26 percent of the faculty, 50 years of age and older, have participated in PERA's retirement counseling services. The higher the level of education the more likely the respondent is to participate in the PERA service.

Over 54 percent of the respondents 40 years of age and older were supportive of establishing a Career/Life Planning Program in their institutions; 57 percent of these respondents were under the age of 50.

Perceptions of Faculty and Presidents

In the ordinal ranking of opinion/perception statements, both population groups ranked the following statement the highest: keeping faculty technologically current is a challenge for community colleges. The faculty also highly agreed that encouraging faculty to extend their working years will require an attractive incentive package. The faculty disagreed with the statement that the present retirement policies are satisfactory and changes are not needed.

The presidents highly agreed that emeritus faculty designation should be based on past performance. The presidents disagreed with the statement that their college had the financial resources to encourage outstanding educators to remain working beyond their retirement eligibility.

Opinions of Faculty 55 Years of Age and Older

The older faculty agreed that working beyond retirement is often related to income issues. This group also perceived teaching opportunities at their college to be limited for retired faculty. When asked if they had experienced age discrimination, 6 males holding graduate degrees said yes; 115 females responded no to the question.

Competitors and Competitiveness

Six of the community college presidents ranked four-year public colleges/universities as their major competitor for hiring qualified faculty; and, the second competitor was the local public schools.

When presidents were asked what would help their college be more competitive in recruiting and retaining a quality instructional staff, the top three responses were higher salaries at the entry level; higher standards for faculty in the academic fields (along with higher salaries); and reduced student contact hours in the general education/academic areas.

When faculty 55 years of age and older were asked what would help their college be more competitive in recruiting and retaining a quality instructional staff, their answers varied according to their level of education. For example, individuals holding a graduate degree ranked financial incentives to continue teaching; individuals with a Bachelor's degree ranked higher salaries at the

entry level; and individuals with an Associate degree or less ranked an improved professional working environment (faculty offices, adequate support staff, availability of modern instructional technology).

The older faculty did not perceive higher degree standards for the academic fields or reduced student contact hours in the general education/academic areas making colleges more competitive in recruiting and retaining a quality instructional staff.

Discussion

The faculty at Colorado's community colleges are fairly well educated, and conspicuously white. There is an excellent age distribution of faculty in Colorado's community colleges. Of the 645 faculty who responded to the survey, 128 or 19.8 percent are 55 and older and only 19 percent plan to take early retirement. Mathematics and the Humanities will probably be the two instructional areas where the competition will be the highest for qualified instructors.

Whether there will or will not be a faculty shortage in the community colleges--as predicted in the literature for the four-year institutions--may not be the germane question. The question may well be: Will the colleges be committed to replacing those who retire with equally qualified instructors? Slightly different questions could also be raised. Are there opportunities to make changes in the organization of curriculum and instruction? Should the retiree be replaced in the same program/discipline? What kind of recruitment, compensation and benefit package will be necessary to be competitive in a changing market?

Most of the faculty favored some form of incentive to continue working beyond retirement eligibility. There was no clear mandate as to what incentive would encourage faculty to continue their professional career beyond retirement eligibility. This may mean the faculty perceive they have more to gain in retiring than in deferring retirement.

A salient factors from the findings are the number of faculty who are not sure if they will continue teaching until retirement (21.3 percent) or stay at the college where they are employed (30.6 percent). Retirement from an organization is inevitable. An issue that may be of greater importance is faculty vitality. Research studies on all sectors of the American workforce have found that it is difficult to consider job satisfaction without considering what aspects of the work experience are important to the individual.

The findings suggest that keeping faculty technologically current, and engaging in career/life planning are important to faculty and presidents.

Faculty vitality is linked to tangible and intangible benefits such as income potential, career development, collaboration with colleagues, travel, sabbatical leaves, wellness programs, financial planning, pre-retirement counseling, special projects. Supporting faculty vitality and career renewal over the professional life may be the key factor to retention. The creation of a continuous learning environment for everyone (including the faculty and administrators) is vital for maintaining a productive, vibrant workforce. WICHE in its most recent discussion paper on faculty supply and demand focused on three issues that must be addressed by decision makers in education to avoid a faculty shortage crisis: (1) compensation and recruitment, (2) maintaining a faculty that is both stable and flexible, and (3) professional development. The community colleges should take a broader look at its human resource policies.

The retention incentives and work options ranked highest by the faculty require financial resources. The years of financial constraints in the community colleges were reflected in the retention incentives and work options ranked highest by the presidents such as phased retirement, redesign jobs to include other functions, job sharing, compressed workweek, mentoring. These options can be accomplished through changes in organization or structure with less emphasis on financial resources.

Recommendations

The following recommendations are based on the data analysis and review of the literature:

1. Consider the following retention incentives recommended by faculty: (a) substantial raise for each year worked beyond retirement eligibility or (b) a paid-up annuity for delaying retirement.

2. Develop and implement a flexible retirement system that allows for early retirement as well as maximizes opportunities for continued work contributions, and perhaps train faculty for a career change that will benefit the individual and the institution.

3. Develop human resource policies related to recruitment, development, job structure, incentives, performance appraisal.

4. Continue working for increases in faculty salary and funds for programs that maintain faculty's vitality and productivity.

5. Base emeritus faculty designation on past performance.

6. Conduct a study of faculty development systems to determine the essential components; a system that is institutionally driven and based on organizational needs as well as individual needs.

7. Recruit minorities and women for those colleges where the faculty does not reflect the ethnic and gender diversity of the population it serves.

8. Develop as a part of faculty development, a career/life program for different age groups.

9. Determine the technological skills needed by program areas to be effective teachers and managers of learning, and determine if faculty education/training is needed.

10. Be sensitive to the aspirations of older faculty, specifically their experiences need to be bridged with the technologies and opportunities of tomorrow.

11. Consider the interpersonal level for helping individual employees achieve optimal work adjustment and make a smooth transition to retirement. This includes financial counseling.

12. Establish a faculty information data base that will support strategic planning and professional development efforts at both the institution and system levels.

13. Integrate the above into coherent organizational programs that will be a source of benefit and pride to the institution.

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APPENDIX A

SURVEY INSTRUMENTS

COLORADO COMMUNITY COLLEGE FACULTY SURVEY

This survey is for full-time teaching faculty. For the purpose of this survey, a full-time teacher is one who teaches more than 50 percent of an instructional work load.

This survey is part of a larger study sponsored by the **Colorado Community College & Occupational Education System** and the **Governor's Job Training Office.** This survey instrument focuses on faculty retirement and its impact on human resource planning.

All responses will be confidential. The name label is for check-in purposes. Remove name label when returning this instrument to your College President's secretary. Responses will be tallied and reported as cumulative data.

This survey has three sections. **Section A** will be completed by all full-time faculty. **Section B** will be completed by faculty who are 40 years of age and older. If you are 55 years of age or older, please complete all three sections.

If you would like to mail the completed instrument directly to the researcher, inform your College President's secretary so she can check your name off a master list. Mail to:

Dr. Louise J. Keller, President
ICERT, Inc.
1121 Country Club Drive - LPR
Estes Park, CO 80517

Telephone and Fax: (303) 586-6474

DEADLINE FOR RETURN: OCTOBER 26, 1990

SECTION A

A.1 Gender

1_____ Female.
2_____ Male.

A.2 As of **January 1, 1991**, what will be your age? Check the appropriate age group.

1_____ 39 or less.
2_____ 40 - 44.
3_____ 45 - 49.
4_____ 50 - 54.
5_____ 55 - 59.
6_____ 60 - 64.
7_____ 65 - 69.
8_____ 70 - 74.
9_____ 75 or more.

A.3 The following coded classification of instructional programs (CIP) may bare little or no resemblance to your system, but check **one** program that **best describes** your area of teaching in either the vocational/occupational/technical field **or** the academic/general education field. **ONLY ONE CHECK MARK**

Vocational/Occupational/Technical Oriented Programs.

AGRICULTURE
1_____ Agriculture (Agribusiness & Agricultural Production).

BUSINESS
2_____ Business & Management (Adm., Recreational Mgm., Real Estate, Small bus. Mgm., Finance, Law).
3_____ Business & Office (Accounting, Data Processing, Typing, General Office, Secretarial).
4_____ Marketing & Distribution (Retailing, Fashion Merchandise, Product Marketing, Travel).

HEALTH
5_____ Health (Nursing, Health Sciences, Allied Health).

HOME ECONOMICS
6_____ Home Economics (Occupational Home Econ., Child Care).

TECHNICAL EDUCATION
7_____ Protective Services (Criminal Justice, Fire Protection).
8_____ Computer/Information Sciences.

9_____ Engineering/Science Technologies (Pre-Engineering, engineering Technologies, Science Technologies).
10_____ Communication Technologies (Media, Photography).

TRADE AND INDUSTRY
11_____ Includes: Construction, Automotive, Mechanics & Repairers, Drafting, Precision Metal, Other Precision Production, Transportation & Material Moving, Personal & Misc.Services.

SPECIAL NEEDS
12_____ Coop-G, Supplemental Services, Voc. Counseling and other.

Academic Programs/General Education Programs

MATHEMATICS AND SCIENCE
13_____ Mathematics and Statistics.
14_____ Sciences (Biology, Chemistry, Physics, other).

LETTERS, HUMANITIES, AND COMMUNICATION
15_____ Letters (English, Composition, Literature, Speech, Technical Writing).
16_____ Humanities (Foreign Language, Philosophy, Religion, other).
17_____ Communication (Journalism, other).

SOCIAL SCIENCES
18_____ Includes: Anthropology, Economics, Geography, History, Political Science & Government, Psychology, Area & Ethnic Studies.

ART AND DESIGN
19_____ Includes: Dance, Fine Arts, Music, Other Visual & Performing Arts, Landscaping, Interior Design, Architecture & Environmental Design, other).

EDUCATION
20_____ Education.

OTHER
21_____ Basic Skills, Developmental Studies.

(Continued on the next page)

A.4 Check your highest level of education as of January 1, 1991.

1_____ Some high school, no diploma.
2_____ GED or High School Diploma.
3_____ Associate Degree.
4_____ Bachelor's Degree.
5_____ Master's Degree.
6_____ Specialist's Degree (Ed.S).
7_____ Doctorate.
8_____ Post-doctoral Studies.

A.5 Check your ethnic background.

1_____ Asian or Pacific Islander.
2_____ Black or African American.
3_____ Indian (Native American).
4_____ Spanish/Hispanic or Mexican American.
5_____ White or Caucasian.
6_____ Other.

A.6 Do you plan to **continue teaching** until you are eligible to receive PERA retirement benefits?

1_____ Yes.
2_____ No.
3_____ I'm not sure.

A.7 Are you planning to **stay at this institution** until you are eligible to receive PERA retirement benefits?

1_____ Yes.
2_____ No.
3_____ I'm not sure.

A.8 Do you plan to **take early retirement** under the current Early Retirement Policy?

1_____ Yes.
2_____ No.
3_____ I'm not sure.

A.9 What **year** do you intend to retire? _____

IF YOU ARE 40 YEARS OF AGE AND OLDER....continue with this survey.

IF your age is 39 or less, you may **stop** at this point and return this survey to your college President's Secretary. Make sure your name is checked-off for returning or mailing the survey. Remove the cover letter with the name label....**THANKS!**

SECTION B – TO BE COMPLETED BY FACULTY 40 YEARS OF AGE AND OLDER

B.1 Rank order those concerns you have about retiring and aging. #1 represents your major concern, and so forth. If you have no concerns, mark the last response item.

a_____ Having adequate financial resources.
b_____ Physical concerns/health problems.
c_____ Loss of identity and importance.
d_____ Loss of contact with peers and friends.
e_____ Too much free time.
f_____ Change in lifestyle.
g_____ Too many demands on my time by family, friends, or community.
h_____ Loss of independence.
i_____ Other retirement concerns.
j_____ No retirement concerns at this time.

B.2 What are your retirement plans at this time? Rank your top **three plans**. #1 represents the top plan, and so forth. If you have no plans, check the last item.

a_____ Travel.
b_____ Pursue hobbies.
c_____ Relax/no special plans.
d_____ Learn about topics of interest.
e_____ Work part-time in current career field
f_____ Develop new skills.
g_____ Pursue a new career.
h_____ Complete a degree/pursue more education.
i_____ Other (PLEASE SPECIFY)_____
_____.
j_____ No plans at this time.

B.3 What factors would encourage you to continue your professional career beyond retirement eligibility at the institution where you are now working? Rank only those incentives you would seriously consider by placing a #1 opposite the most important incentive to you; #2 for the next best incentive, and so forth.

a_____ Receive a paid-up annuity for delaying retirement.

b_____ Re-design present job to include other functions and reduce teaching load.

c_____ Re-design present job to include only classroom instruction.

(Continued on the next page)

d_____ Plan a phased retirement program. For example, at age 55, the work days/hours would be reduced, thus extending the number of working years.

e_____ Receive a substantial raise for each year worked beyond retirement eligibility.

f_____ Compress the instructional workweek into three days.

g_____ Work part-time after retirement at a prorated full- time salary.

h_____ Other (Please specify) _____

_____

i_____ There is **no incentive** that would persuade me to continue working full-time or part-time past retirement eligibility.

B.4 Businesses are beginning to provide a variety of work options in order to encourage older employees to remain working beyond the usual retirement age, either part-time or full-time. From your perception are the following work options realistic for community colleges to consider? Please rate each work option, using the following response scale:

5 An excellent idea, should be explored.
4 An idea that probably has some potential.
3 No opinion.
2 An idea that probably will not work.
1 An appalling idea, should never be considered.

a_____ **Mentoring.** Provide counsel to less experienced instructors.

b_____ **Job sharing.** Two or more faculty members share the same job. This would mean sharing salary and instructional responsibilities.

c_____ **Part-time employment.** Compensation for part-time work is a prorated full-time salary.

d_____ **Performance (project) contracting.** Employment is based on a legal document that specifies tasks and time-lines; signed by the institution and retired employee.

e_____ **Enterprise contracting.** Former faculty member establishes a business that enables the college to contract with the business, thus avoiding problems related to the number of days a former employee can work under PERA regulations.

f_____ **Compressed instructional workweek.** Options available to full-time and part-time faculty. An example of a compressed instructional workweek right be M-T-W or Th-F-Sat.

(Continued on the next page)

g_____ **Phased retirement.** At age 55--after at least five years of service--individuals are eligible for reducing the number of days worked per year. This would require the employee to work longer to complete retirement eligibility.

B.5 Have you participated in the Retirement Counseling Services of PERA within the past five years?

1_____ Yes.
2_____ No.

B.6 Do you plan to participate in this counseling service of PERA?

1_____ Yes.
2_____ No.
3_____ I'm not sure.

B.7 If you were to participate in a Career/Life Planning Program sponsored by your institution, which of the following topics would be the most pertinent to you at this time? Rank your first five choices, #1 representing your first choice, and so forth.

a_____ Career Planning/Career Pathing.
b_____ The retirement decision-making process.
c_____ The psychology of growing older.
d_____ State benefits, Social Security, Medicare/Medicaid.
e_____ Financial planning for retirement.
f_____ Strategies for maintaining physical wellness.
g_____ Creation of a balanced social support system.
h_____ Dealing with aging parents.
i_____ New approaches to retirement living.
j_____ Activities: leisure and work pursuits.
k_____ Entrepreneurship opportunities for older Americans.
l_____ Training by my institution for a new career after retirement.
m_____ Other (PLEASE SPECIFY)_____
_____.

B.8 Should your institution be encouraged to establish an on-going program that focuses on career/life planning?

1_____ Yes.
2_____ No.
3_____ I'm not sure.

Instructions: Please **circle** a number that corresponds to the response scale: Strongly Agree **(SA)**, Agree **(A)**, Undecided **(UN)**, Disagree **(D)**, or Strongly Disagree **(SD)**.

		SA	A	UN	D	SD
B.9	Encouraging faculty to work beyond retirement eligibility is a worth-while goal of the college.	5	4	3	2	1
B.10	The present retirement policies of CCCOES or my District College are satisfactory; changes are not needed.	5	4	3	2	1
B.11	Emeritus faculty designation should be based on past performance as an instructor.	5	4	3	2	1
B.12	Teaching overloads have become the most used method for increasing PERA retirement benefits.	5	4	3	2	1
B.13	The needs of older faculty should be a powerful cause for institutional concern and action planning.	5	4	3	2	1
B.14	Assisting faculty in remaining current in the face of rapid technological change is a growing challenge for community colleges.	5	4	3	2	1
B.15	Encouraging faculty to extend their working years will require an attractive incentive package.	5	4	3	2	1
B.16	Colleges have the financial resources to encourage outstanding educators to remain beyond their retirement eligibility.	5	4	3	2	1
B.17	Career/Life Planning Programs should be designed for different age groups.	5	4	3	2	1
B.18	If there is a faculty shortage in the foreseeable future, the institutions least affected will be those located in rural Colorado.	5	4	3	2	1

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SECTION C – TO BE COMPLETED BY FACULTY 55 YEARS OF AGE AND OLDER

If you are 55 years of age and older, you should have completed Section A and B. Please take an extra few minutes and answer the following:

Please circle one number that corresponds with your position.

		SA	A	UN	D	SD
C.1	Working beyond "normal" retirement is often related to **income** issues.	5	4	3	2	1
C.2	Not working beyond "normal" retirement is often related to **health** issues.	5	4	3	2	1
C.3	Economic pressure to delay retirement are mounting.	5	4	3	2	1
C.4	Most senior faculty are experiencing job burn-out.	5	4	3	2	1
C.5	Most faculty who are near retirement have other wage earning pursuits in addition to their work at the college.	5	4	3	2	1
C.6	Other than teaching, job opportunities at the college are limited for retired faculty.	5	4	3	2	1

C.7 What does your college need to be more competitive in recruiting and retaining a quality instructional faculty? **Select and rank order** those items you consider significant. #1 represents the most significant item, and so forth.

a_____ Higher salaries at the entry level.
b_____ Financial incentives to continue teaching.
c_____ More work options before and after retirement.
d_____ Higher degree standards for faculty in academic fields along with higher salaries.
e_____ Higher salaries to attract more business and industry employees to teaching.
f_____ Reduced student contact hours, in the vocational/occupational/technical areas.
g_____ Reduced student contact hours, in the general education/academic areas.
h_____ Greater latitude for experimentation (e.g. designing jobs which encompass multiple skills and functions, thus better utilizing of personnel).
i_____ Improved performance standards and assessment procedures that weed-out the poor instructors and reward individuals for excellence in teaching and related activities.
j_____ An improved professional working environment (e.g., faculty offices, adequate support staff, availability of modern instructional technology).
k_____ Professional development plans that promote faculty career planning and pathing.
l_____ Other (PLEASE SPECIFY)_____
_____
_____
_____.

C.8 Have you experienced age discrimination at current institution?

1_____ Yes.
2_____ No.

If your answer is yes, please describe. Remember, you will be removing the name label from this instrument to ensure anonymity.

THANKS FOR COMPLETING THIS SURVEY. Remove the name label and return to your College President's Secretary or mail directly to researcher by **10-26-90**.

INSTITUTIONAL SURVEY
FACULTY RETIREMENT AND RETENTION

There are two surveys to be completed by the President with input from his/her executive staff. This instrument is concerned with faculty retirement, future human resource needs, and ways to retain the services of faculty. The other instrument is concerned with your older student population and community organizations/agencies which assist older clients to enter/re-enter the work force.

This study is being sponsored by the **Colorado Community College & Occupational Education System** and the **Governor's Job Training Office.**

All responses will be confidential. Responses will be tallied and reported as cumulative data. When the instrument is completed please give it to your secretary for returning to the researcher.

DEADLINE IS OCTOBER 26, 1990

FOR MAILING TO:

Dr. Louise J. Keller, President
ICERT Inc.
1121 Country Club Dr.
Estes Park, CO 80517

Telephone and Fax (303) 586-6474

Form: INS-FAC

Institutional Code /___/___/

INSTITUTIONAL SURVEY REGARDING FACULTY

1. **Do you anticipate a faculty shortage near the end of this decade at your institution?**

   1_____ Yes.
   2_____ No.

   If you marked **No,** go to Question #3.
   If you marked **Yes,** answer Question #2.

2. Check the areas where you anticipate a shortage.

   a_____ Agriculture.
   b_____ Business.
   c_____ Health.
   d_____ Home Economics.
   e_____ Technical Education.
   f_____ Trade & Industry.
   g_____ Special Needs.
   h_____ Mathematics & Science.
   i_____ Letters, Humanities, Communication.
   j_____ Social Sciences.
   k_____ Art and Design.
   l_____ Education.
   m_____ Other (PLEASE SPECIFY) _____
   _____.

   Go to question #4.

3. If you marked **no** to question #1, rank order those reasons for your response. #1 represents your major reason for **not** anticipating a faculty shortage in the foreseeable future.

   a_____ The flexibility in the State's Vocational Credentialing requirements allow community college administrators to attract full-time faculty from agriculture, business, industry, government, and other educational and non-educational entities.

   b_____ The college's salary schedule attracts public school teachers to seek employment.

   c_____ The current length of faculty contracts is attractive to potential full-time faculty.

   d_____ The current teaching load will be an advantage in recruiting qualified public school teachers.

   e_____ The lack of State Certification requirements in the General Education/Academic areas allows colleges to hire qualified teachers from business, industry, government, and other private entities.

4. Who are your major competitors for hiring qualified faculty? Rank order those you consider as competitors. #1 represents your major competitor, and so forth.

a_____ Elementary/Secondary Schools.
b_____ Area Vocational-Technical Schools.
c_____ Private two-year schools.
d_____ Four-year public colleges/universities.
e_____ Four-year private colleges/universities.
f_____ Other (PLEASE SPECIFY)_____
_____.
g_____ No competitors.

5. What is needed for your college to be more competitive in recruiting and retaining a quality instructional staff ? Select and rank order those items you consider significant. #1 represents the most significant item.

a_____ Higher salaries at the entry level.
b_____ Financial incentives to continue teaching beyond retirement eligibility.
c_____ More work options before and after retirement.
d_____ Higher degree standards for faculty in the academic fields along with higher salaries.
e_____ Higher salaries to attract more business and industry employees to teaching.
f_____ Reduced student contact hours in the vocational-technical areas.
g_____ Reduced student contact hours in the general education/academic areas.
h_____ Greater latitude for experimentation (e.g., designing jobs which encompass multiple skills and functions,thus better utilization of personnel).
i_____ Improved performance standards and assessment procedures that weed-out the poor instructors and reward individuals for excellence in teaching and related activities.
j_____ An improved professional working environment (e.g., faculty offices, adequate support staff, individual availability of modern instructional technology).
k_____ Professional development policy that promotes faculty career planning and pathing.
l_____ Other (PLEASE SPECIFY)_____
_____.

6. From your perception, what incentives would encourage your current faculty to continue working beyond their retirement eligibility? Rank only those you think faculty would seriously consider. #1 represents the foremost incentive.

a.____ Receive a paid-up annuity for delaying retirement.

b.____ Redesign their present jobs to include other functions and reduce teaching loads.

c.____ Redesign their present jobs to include only teaching.

d.____ Plan a phased retirement program.

e.____ Receive a substantial raise for each year worked beyond retirement eligibility.

f.____ Compress the instructional workweek into three days.

g.____ Be assured that part-time employment is available upon retirement and compensation is a prorated full-time salary.

h.____ Other (PLEASE SPECIFY)_____
_____.

i.____ No incentive will encourage our faculty to continue working full-time or part-time past retirement eligibility.

7. Businesses are beginning to redesign work tasks in order to encourage older employees to remain working beyond the usual retirement age, either part-time or full-time. From your perception, are the following work options realistic for community colleges to consider? Please rate each work option using the following scale:

5 An excellent idea, should be explored.
4 An idea that probably has some potential.
3 No opinion.
2 An idea that probably will not work.
1 An appalling idea, should never be considered.

a_____ **Mentoring.** Faculty provides counsel to less experienced instructors.
b_____ **Job sharing.** Two or more faculty members share the same job. This would mean sharing salary and instructional responsibilities.

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c_____ **Part-time employment.** Compensation is based on a prorated full-time salary.

d_____ **Performance (project) contracting.** Employment is based on a legal document that specifies tasks and time-lines; signed by the institution and retired employee.

e_____ **Enterprise contracting.** Former employee establishes a business that enables the college to contract with the business, thus avoiding problems related to the number of days a former employee can work under PERA regulations.

f_____ **Compressed instructional workweek.** Options available to full-time and part-time faculty. An example of a compressed instructional workweek might be M-T-W or Th-F-Sat.

g_____ **Phased retirement.** At age 55--after at least five years of service--individuals are eligible for reducing the number of days worked per year. This would require the faculty member to work longer to complete retirement eligibility.

Instructions: Please respond to each statement by **circling** a number that corresponds to this response scale: Strongly Agree **(SA)**, Agree **(A)**, Undecided **(UN)**, Disagree **(D)**, or Strongly Disagree **(SD)**.

	SA	A	UN	D	SD
8. Encouraging faculty to work beyond retirement eligibility is a worthwhile goal of the college.	5	4	3	2	1
9. The present retirement policies of CCCOES or my District College are satisfactory; changes are not needed.	5	4	3	2	1
10. Emeritus faculty designation should be based on past performance as an instructor.	5	4	3	2	1
11. Teaching overloads have become the most used method for increasing PERA retirement benefits.	5	4	3	2	1

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	SA	A	UN	D	SD
12. The needs of older faculty should be a powerful cause for institutional concern and action planning.	5	4	3	2	1
13. Assisting faculty in remaining current in the face of rapid technological change is a growing challenge for community colleges.	5	4	3	2	1
14. Encouraging faculty to extend their working years will require an attractive incentive package.	5	4	3	2	1
15. College has the financial resources to encourage outstanding educators to remain working beyond their retirement eligibility.	5	4	3	2	1
16. Career/Life Planning Programs should be designed for different faculty age groups.	5	4	3	2	1
17. Working beyond "normal" retirement is often related to **income** issues.	5	4	3	2	1
18. Not working beyond "normal" retirement is often related to **health** issues.	5	4	3	2	1
19. Economic pressure to delay retirement is mounting.	5	4	3	2	1
20. Most senior faculty are experiencing job burn-out.	5	4	3	2	1
21. Most faculty who are near retirement have other wage-earning pursuits in addition to their work at the college.	5	4	3	2	1
22. Other than teaching, job opportunities at the college are limited for retired faculty.	5	4	3	2	1
23. If there is a faculty shortage in the foreseeable future, the institutions **least** affected will be those located in rural Colorado.	5	4	3	2	1

24. **WHAT-IF SCENARIO**. This question is based on an assumption that fifty percent of your entire faculty could retire in the next five years. What do you perceive to be your best options for hiring/retaining qualified faculty? **Select** and **rank** only those you would seriously consider. Use #1 for your first option, and so forth. Leave blank those items you do not consider to be options for your institution.

a_____ Encourage faculty to work full-time beyond retirement eligibility years to increase their PERA retirement income benefits.

b_____ Encourage faculty to work beyond their retirement eligibility years, but at a reduced work load, with full benefits.

c_____ Encourage faculty to take early retirement and work 110 days a year; benefits are not paid; salary is the incentive.

d_____ Design a recruitment program for recent college graduates to work with faculty mentors for several years.

e_____ Increase salaries for new, younger faculty recruits.

f_____ Provide incentives other than salary to encourage older faculty members to remain working full-time or part-time, and younger qualified faculty members to join the professional staff.

g_____ Redesign jobs to reduce the number of entry level positions, and encourage faculty to develop new skills as part of a career planning/pathing program.

THANKS FOR COMPLETING THIS SURVEY.
Please return this instrument to the president's secretary.

ERIC Clearinghouse for
Junior Colleges
MAY 29 1992